Transitioning Children

Children "transition" all the time for many different reasons:

- It is CRITICAL (for financial and recordkeeping reasons) to keep classroom rosters current!
- The following step-by-step examples will help you transition your children properly in both directions)

Example 1:

- They leave the area (PCS) or leave the program

A child is leaving post (PCS'ing)

- They move from classroom to classroom in the same center as they get older
- They move from home to center (and between homes and centers)

Depending on the scenario, a different process will be

Example 1: Child PCS'ing - Quick Steps

1. Global Cancel Change: Adjust the household's fees before the child is moved to history.

2. Roster Transfer To History (Indiv): Move the child from the Current Roster to the Previous Roster (History). This prevents them from being billed for a class they are no longer in.

3. Pass Member Maintenance (Registered Member Update hot button): Expire the child's pass. This keeps the child from showing on certain reports like the Shot Report, Health Assessment, etc.

Example 1: Child PCS'ing - Detail

Before we begin the first step (adjusting the household's fees) we need to gather some information:

- A child is leaving post and their last day at the center is 4/10/02.

- On 4/1/02, the installment billing process was run and the household was charged $200 for their fullday infant program. Their billing frequency is bi-weekly.

- When the billing is run, it bills forward. So our household was actually charged through 4/14/02.

Example 1: Child PCS'ing - Detail

1. **In April 2002, there were 10 business days (week days) from the 1st to the 14th.**
   - **Business days per billing cycle vary from month to month. For example, from April 15 - April 30 there are 12 business days.**
   - **Note: You should include weekday holidays as "business days" since they were already factored out when the rates were set**
   - **So, $200 divided by 10 days = $20 per day.**
2. **Our customer's last day is 4/10/02. They should have only been charged 8 days worth of fees. They were overcharged by 2 days.**

Some bases have "cheat sheets" to figure how much a household was overcharged.

Since CYMS prorates fees for enrollment start dates based on the number of business days in a particular month, it makes sense to calculate adjustments at the other end the same way.

Here's how to manually calculate how much the household in our example was overcharged.

Example 1: Child PCS'ing - Detail

To determine the child's billing frequency and

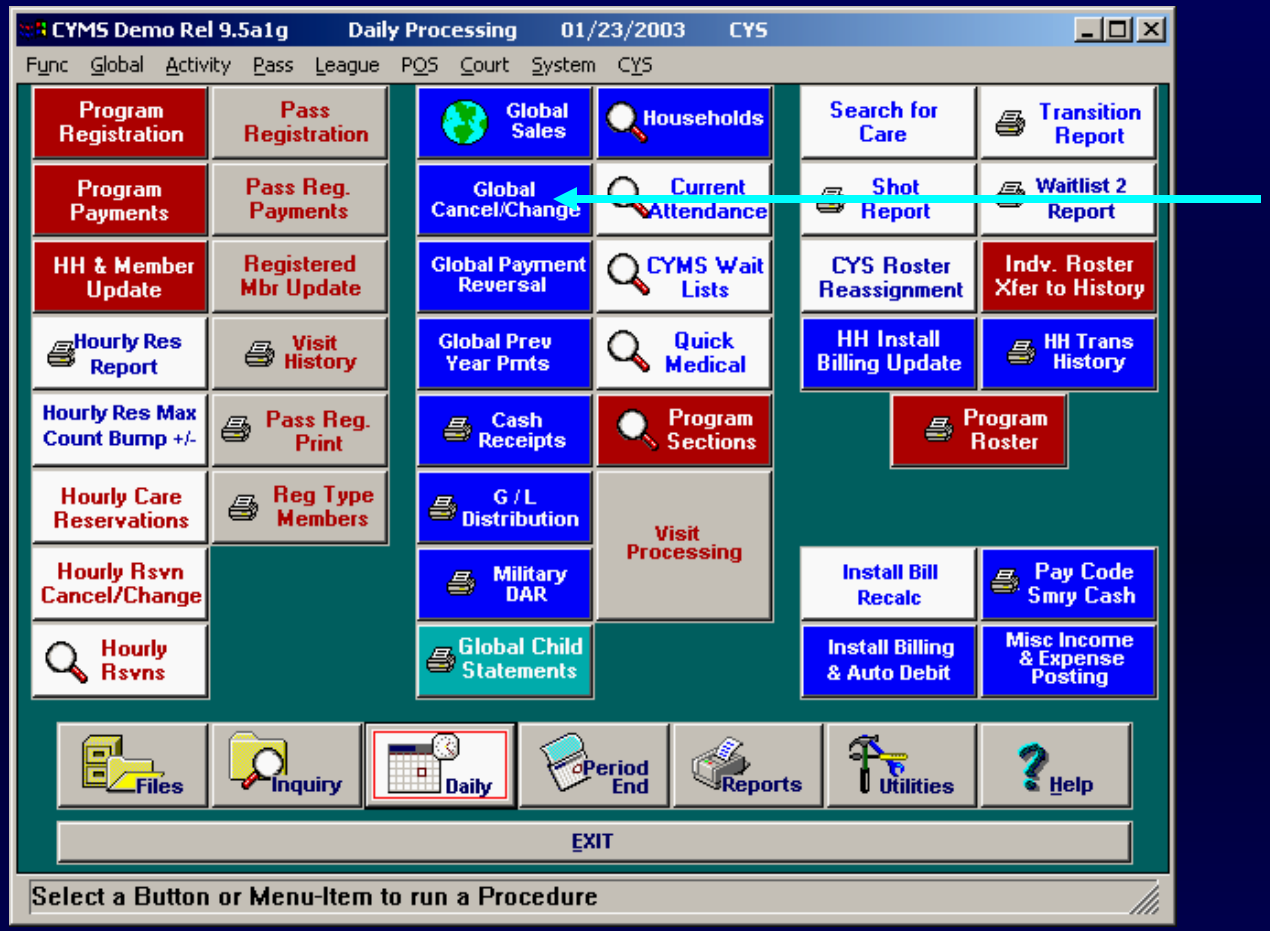
bill amount, use the

HH Installment Billing Update Button.

Example 1: Child PCS'ing – Detail (Step 1)

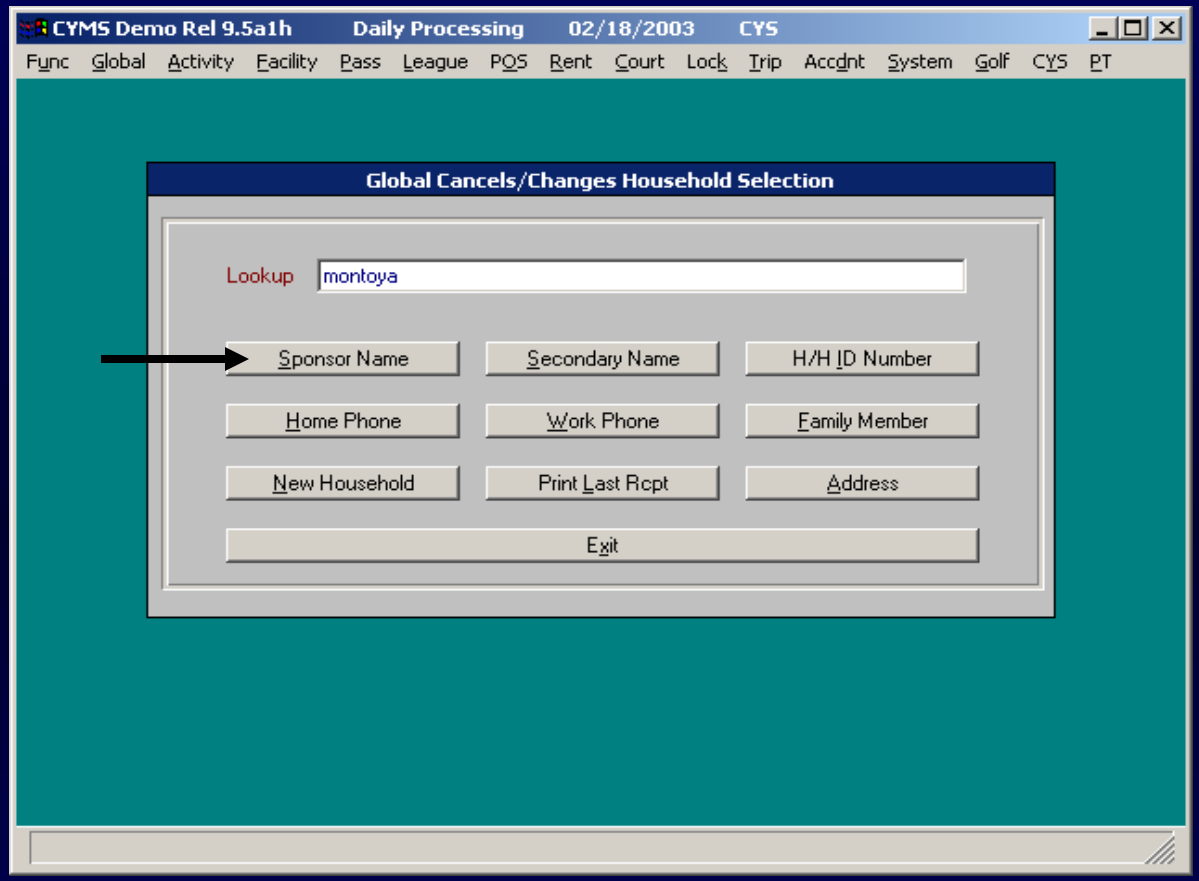
Note:

This step (for our example) should be done after the 4/1 billing, but before the next (4/15) billing



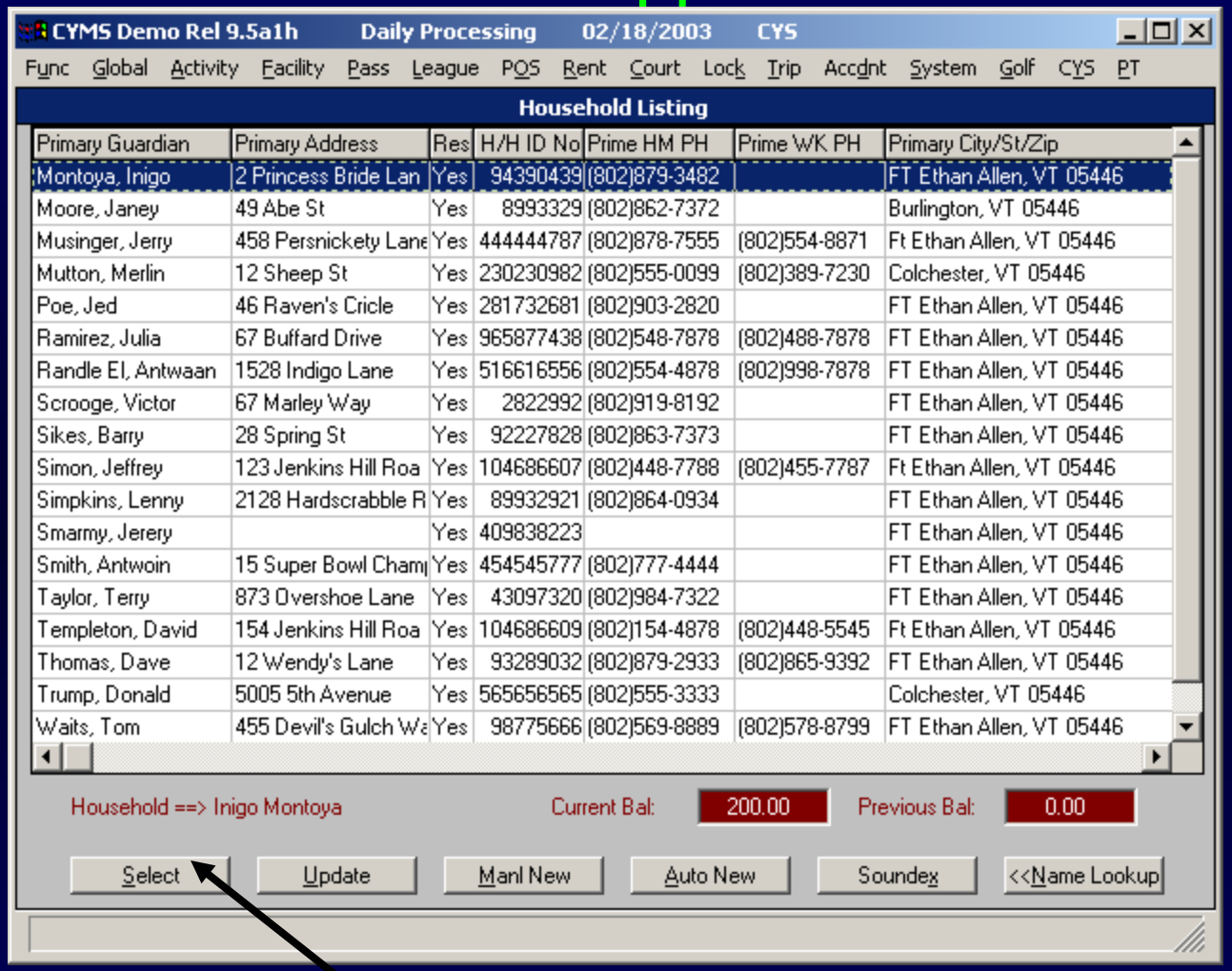
To adjust the household's fees, click the Global Cancel/Change button

Example 1: Child PCS'ing – Detail (Step 1)



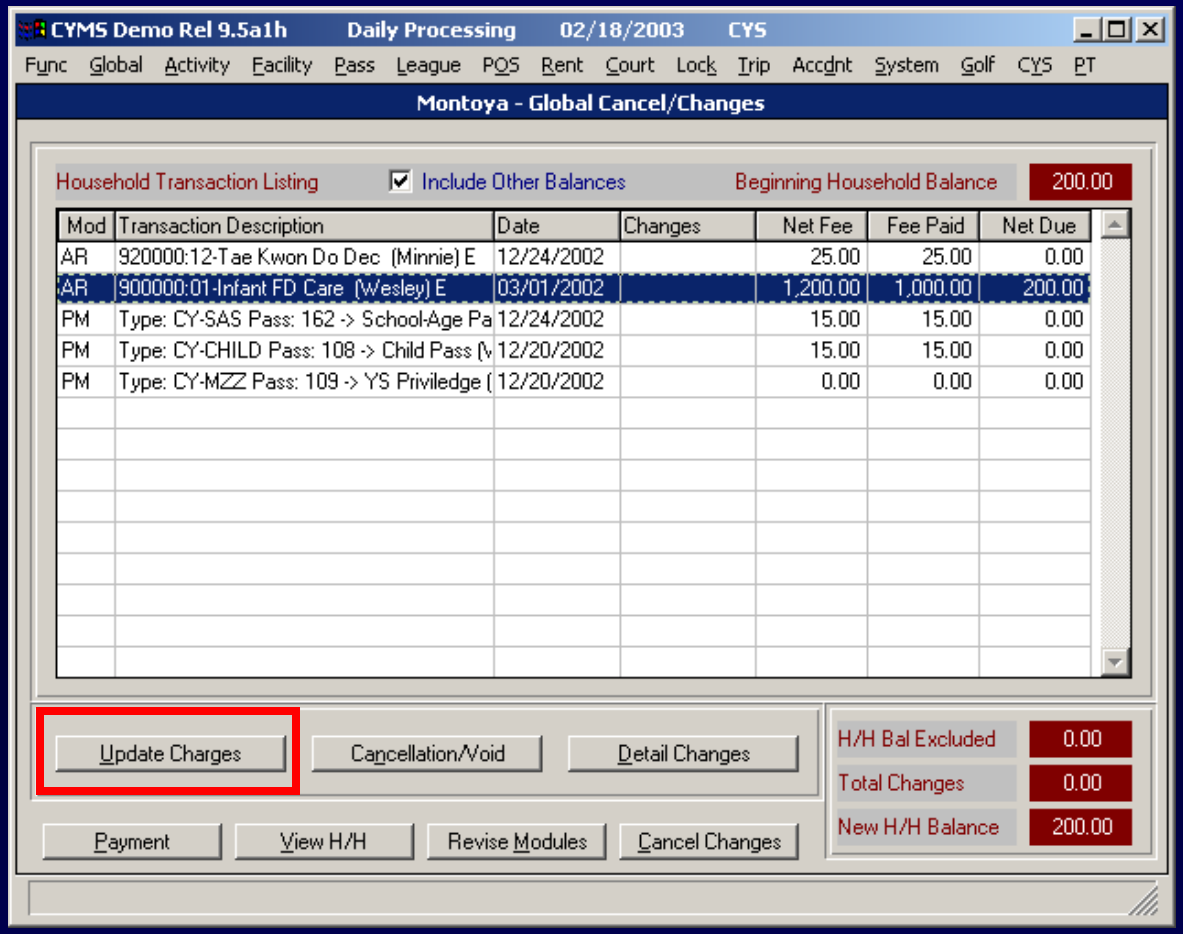
Lookup the household…

Example 1: Child PCS'ing – Detail (Step 1)


CYMS Demo Rel 9.5a1h
Daily Processing
02/18/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Household Listing
Primary Guardian | Primary Address | Res | H/H ID No | Prime HM PH | Prime WK PH | Primary City/St/Zip
Montoya, Inigo | 2 Princess Bride Lan | Yes | 94390439 | (802)879-3482 | | FT Ethan Allen, VT 05446
Moore, Janey | 49 Abe St | Yes | 8993329 | (802)862-7372 | | Burlington, VT 05446
Musinger, Jerry | 458 Persnickety Lane | Yes | 444444787 | (802)878-7555 | (802)554-8871 | Ft Ethan Allen, VT 05446
Mutton, Merlin | 12 Sheep St | Yes | 230230982 | (802)555-0099 | (802)389-7230 | Colchester, VT 05446
Poe, Jed | 46 Raven's Cricle | Yes | 281732681 | (802)903-2820 | | FT Ethan Allen, VT 05446
Ramirez, Julia | 67 Buffard Drive | Yes | 965877438 | (802)548-7878 | (802)488-7878 | FT Ethan Allen, VT 05446
Randle El, Antwaan | 1528 Indigo Lane | Yes | 516616556 | (802)554-4878 | (802)998-7878 | FT Ethan Allen, VT 05446
Scrooge, Victor | 67 Marley Way | Yes | 2822992 | (802)919-8192 | | FT Ethan Allen, VT 05446
Sikes, Barry | 28 Spring St | Yes | 92227828 | (802)863-7373 | | FT Ethan Allen, VT 05446
Simon, Jeffrey | 123 Jenkins Hill Roa | Yes | 104686607 | (802)448-7788 | (802)455-7787 | Ft Ethan Allen, VT 05446
Simpkins, Lenny | 2128 Hardscrabble R | Yes | 89932921 | (802)864-0934 | | FT Ethan Allen, VT 05446
Smarmy, Jerery | | Yes | 409838223 | | | FT Ethan Allen, VT 05446
Smith, Antwoin | 15 Super Bowl Cham | Yes | 454545777 | (802)777-4444 | | FT Ethan Allen, VT 05446
Taylor, Terry | 873 Overshoe Lane | Yes | 43097320 | (802)984-7322 | | FT Ethan Allen, VT 05446
Templeton, David | 154 Jenkins Hill Roa | Yes | 104686609 | (802)154-4878 | (802)448-5545 | Ft Ethan Allen, VT 05446
Thomas, Dave | 12 Wendy's Lane | Yes | 93289032 | (802)879-2933 | (802)865-9392 | FT Ethan Allen, VT 05446
Trump, Donald | 5005 5th Avenue | Yes | 565656565 | (802)555-3333 | | Colchester, VT 05446
Waits, Tom | 455 Devil's Gulch Wa | Yes | 98775666 | (802)569-8889 | (802)578-8799 | FT Ethan Allen, VT 05446
Household ==> Inigo Montoya
Current Bal: 200.00
Previous Bal: 0.00
Select
Update
Manl New
Auto New
Soundex
<<Name Lookup

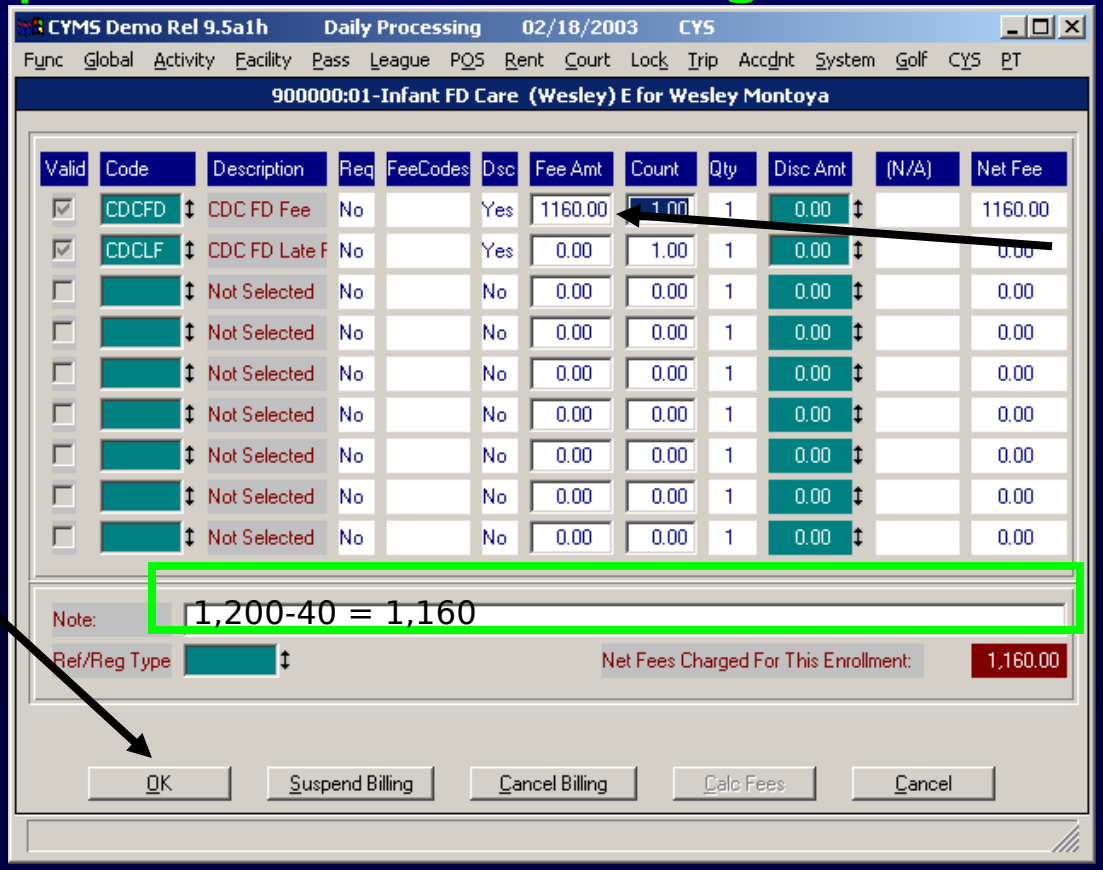
… And select it!

Example 1: Child PCS'ing – Detail (Step 1)


CYMS Demo Rel 9.5a1h
Daily Processing
02/18/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Montoya - Global Cancel/Changes
Household Transaction Listing
Include Other Balances
Beginning Household Balance
200.00
Mod | Transaction Description | Date | Changes | Net Fee | Fee Paid | Net Due
AR | 920000:12-Tae Kwon Do Dec (Minnie) E | 12/24/2002 | | 25.00 | 25.00 | 0.00
AR | 900000:01-Infant FD Care (Wesley) E | 03/01/2002 | | 1,200.00 | 1,000.00 | 200.00
PM | Type: CY-SAS Pass: 162 -> School-Age Pa | 12/24/2002 | | 15.00 | 15.00 | 0.00
PM | Type: CY-CHILD Pass: 108 -> Child Pass (\ | 12/20/2002 | | 15.00 | 15.00 | 0.00
PM | Type: CY-MZZ Pass: 109 -> YS Priviledge (| 12/20/2002 | | 0.00 | 0.00 | 0.00
Update Charges
Cancellation/Void
Detail Changes
H/H Bal Excluded
0.00
Total Changes
0.00
New H/H Balance
200.00
Payment
View H/H
Revise Modules
Cancel Changes

Select the program that was overcharged and click Update Charges

Example 1: Child PCS'ing – Detail (Step 1)


CYMS Demo Rel 9.5a1h Daily Processing 02/18/2003 CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
900000:01-Infant FD Care (Wesley) E for Wesley Montoya
Valid Code Description Req FeeCodes Dsc Fee Amt Count Qty Disc Amt (N/A) Net Fee
CDCFD CDC FD Fee No Yes 1160.00 1.00 1 0.00 1160.00
CDCLF CDC FD Late F No Yes 0.00 1.00 1 0.00 0.00
Not Selected No No 0.00 0.00 1 0.00 0.00
Note: 1,200-40 = 1,160
Ref/Reg Type
Net Fees Charged For This Enrollment: 1,160.00
OK
Suspend Billing
Cancel Billing
Calc Fees
Cancel

Then click OK

In our example, the household was <u>overcharged</u> by $40.

So, we need to <u>reduce the Fee Amount</u> by $40.

To do so, you must <u>CAREFULLY</u> change $1,200 to $1,160

As a double check/audit, you may wish to log your "math" in the <u>Notes</u> field before you change the Fee Amount: $1,200 - $40 = $1,160

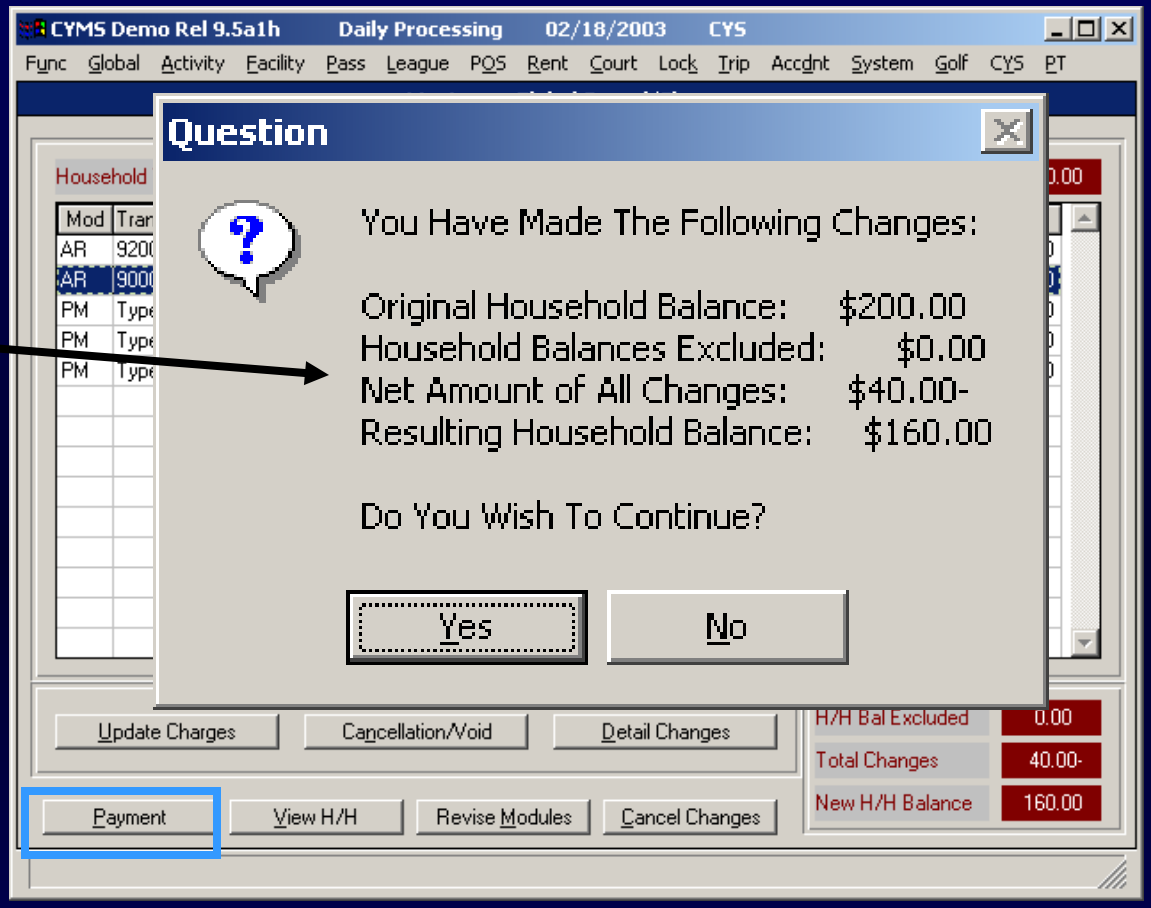
Example 1: Child PCS'ing – Detail (Step 1)

Always Check:

Net Amount Of All Changes.

If correct, click Yes.

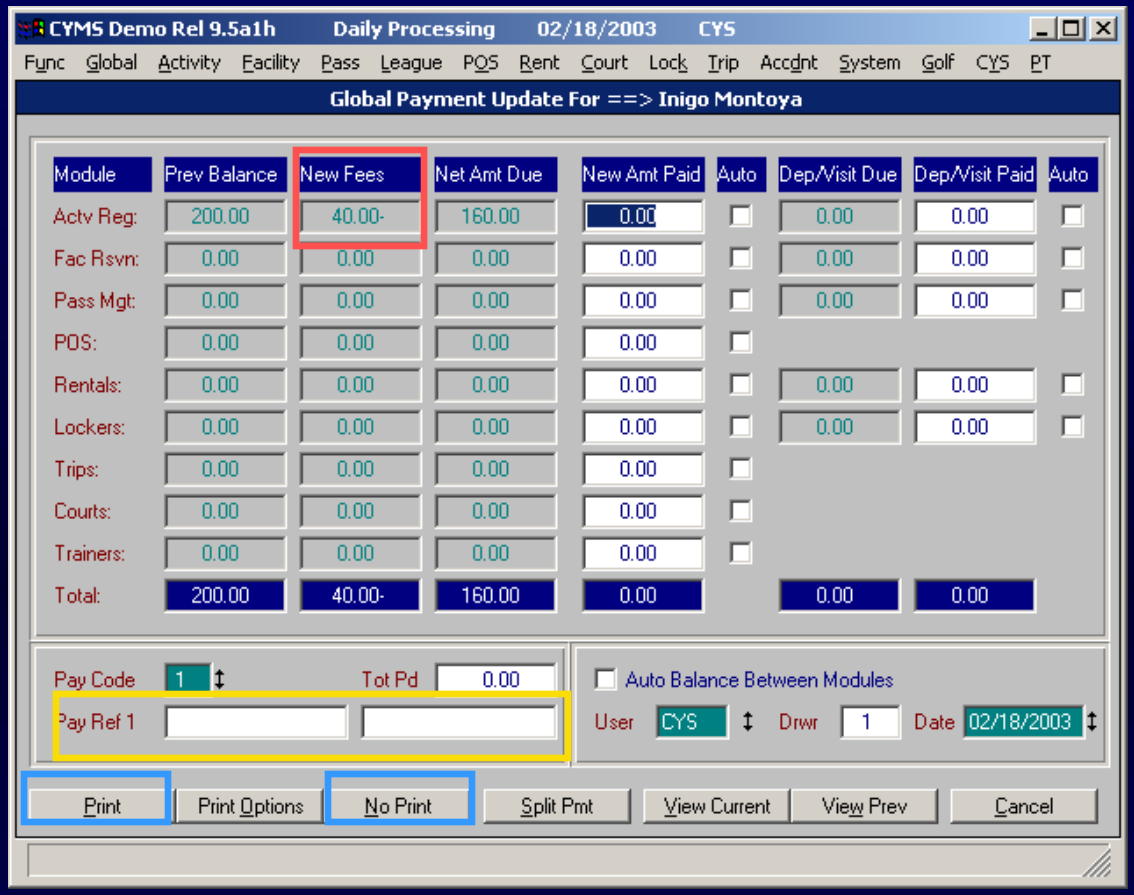
If not, click No and Cancel Changes to start over



To finish, click Payment or Refund . . .

Example 1: Child PCS'ing – Detail (Step 1)

New Fees should equal the amount of your adjustment



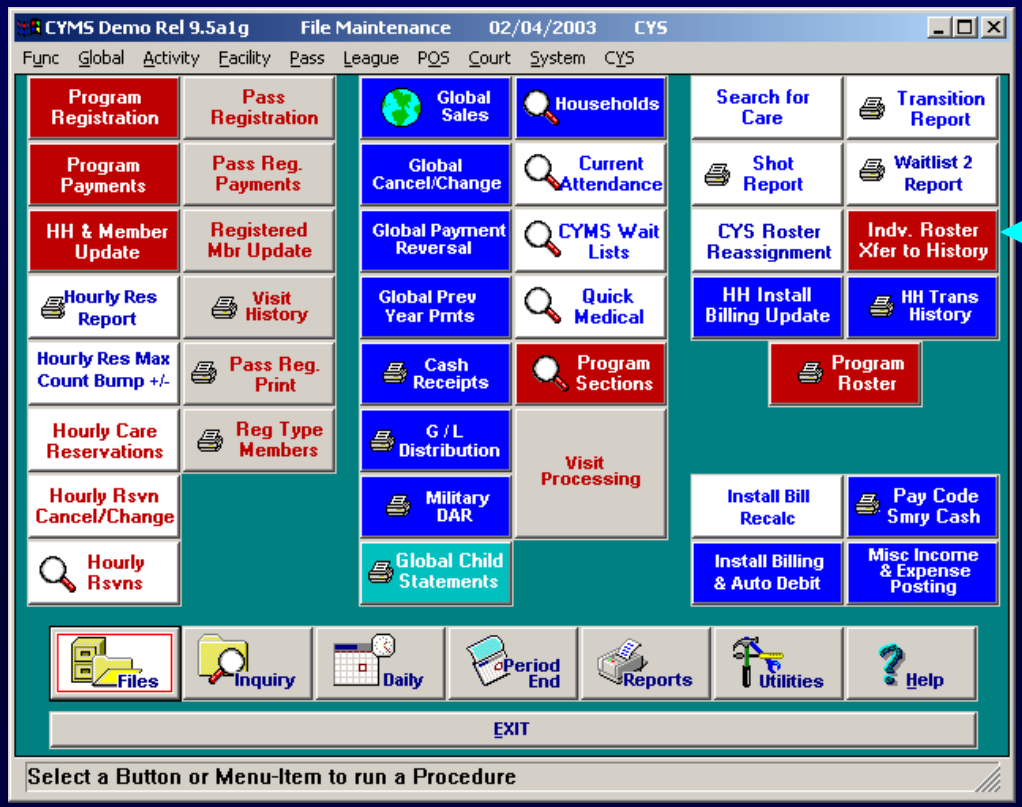
Click Print or No Print to finish

You may want to put in a reference to document why you decreased their fees.

Example 1: Child PCS'ing – Detail (Step 2)

Note:

Step 2 (for our example where the child's last day is 4/10) should be done on the night of 4/10 or the morning of 4/11.



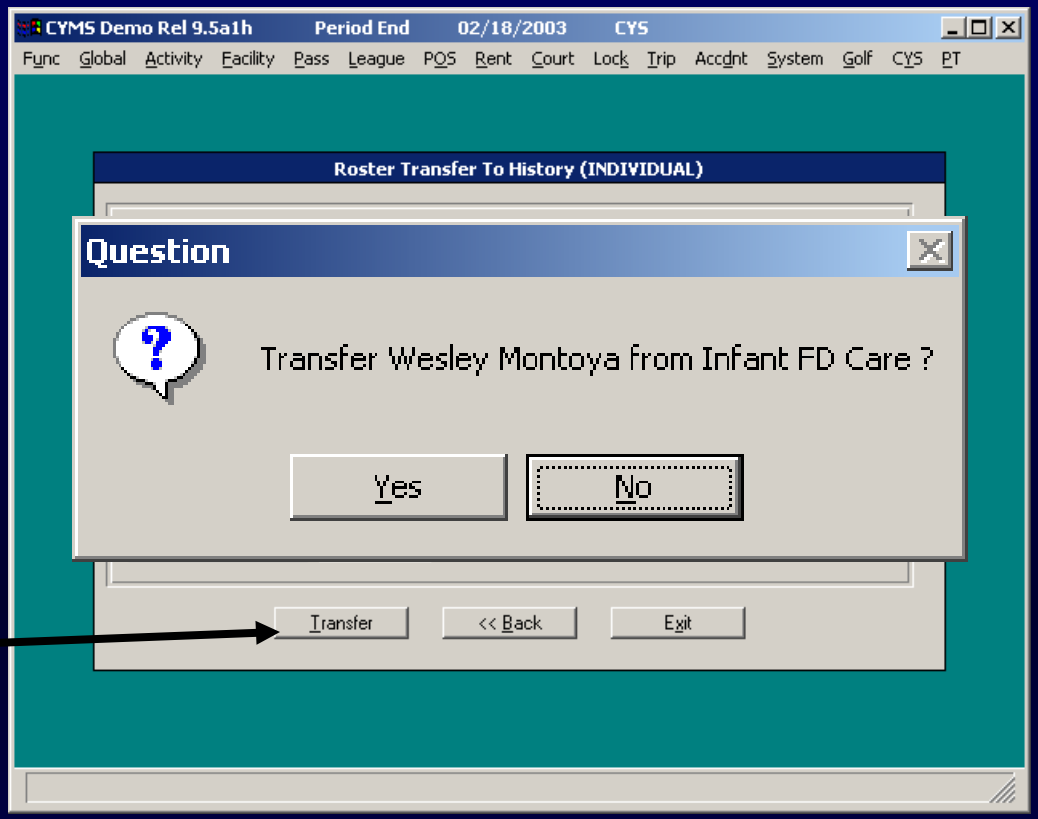
Step 2 - Move the Child to History

Click the Individual Roster Transfer to History button.

(If no button, go to: Period End – Activity -- Roster Maintenance -- Transfer to History Indiv)

Example 1: Child PCS'ing – Detail (Step 2)

Then click Transfer..



.. and Yes to Continue

Lookup the household and select it (not shown).

Highlight the CDC or SAS enrollment.

(Note: You should not move YS enrollments to history using this process).

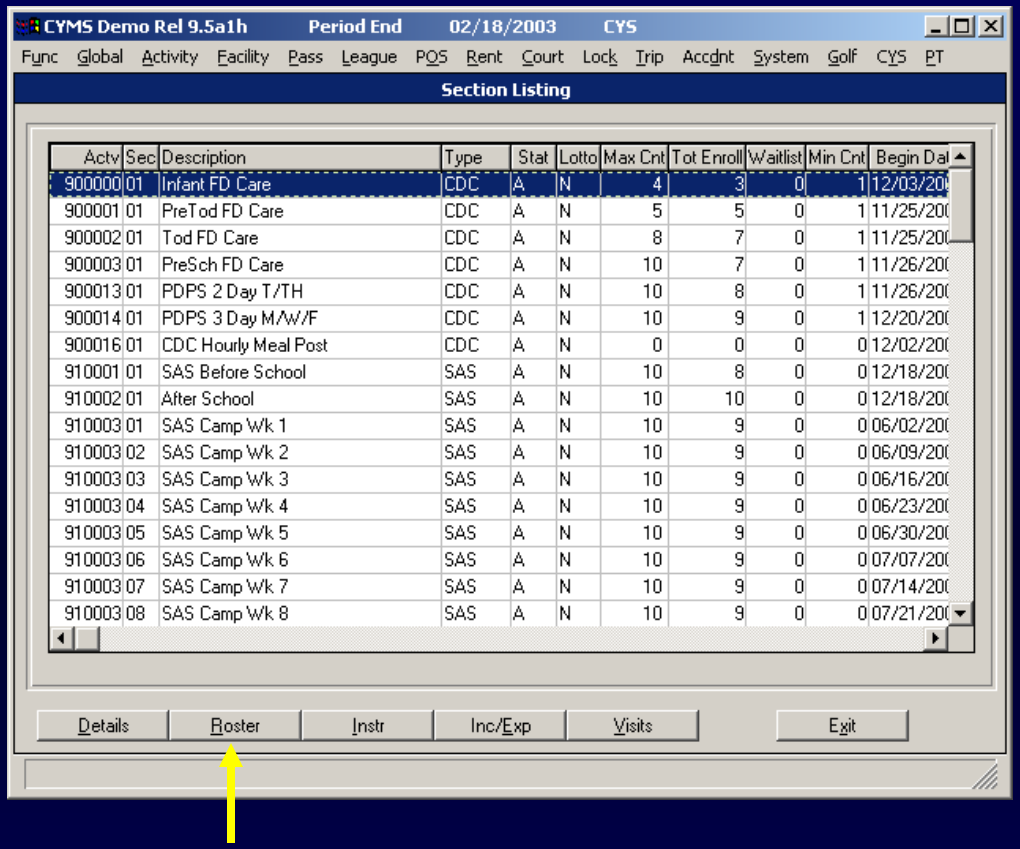
Example 1: Child PCS'ing – Detail (Step 2)

To confirm that the child was moved off the Current Roster and into history:

Click the Program Sections Button.

Note: You only need to do this if you wish to confirm that the child got moved.

Example 1: Child PCS'ing – Detail (Step 2)

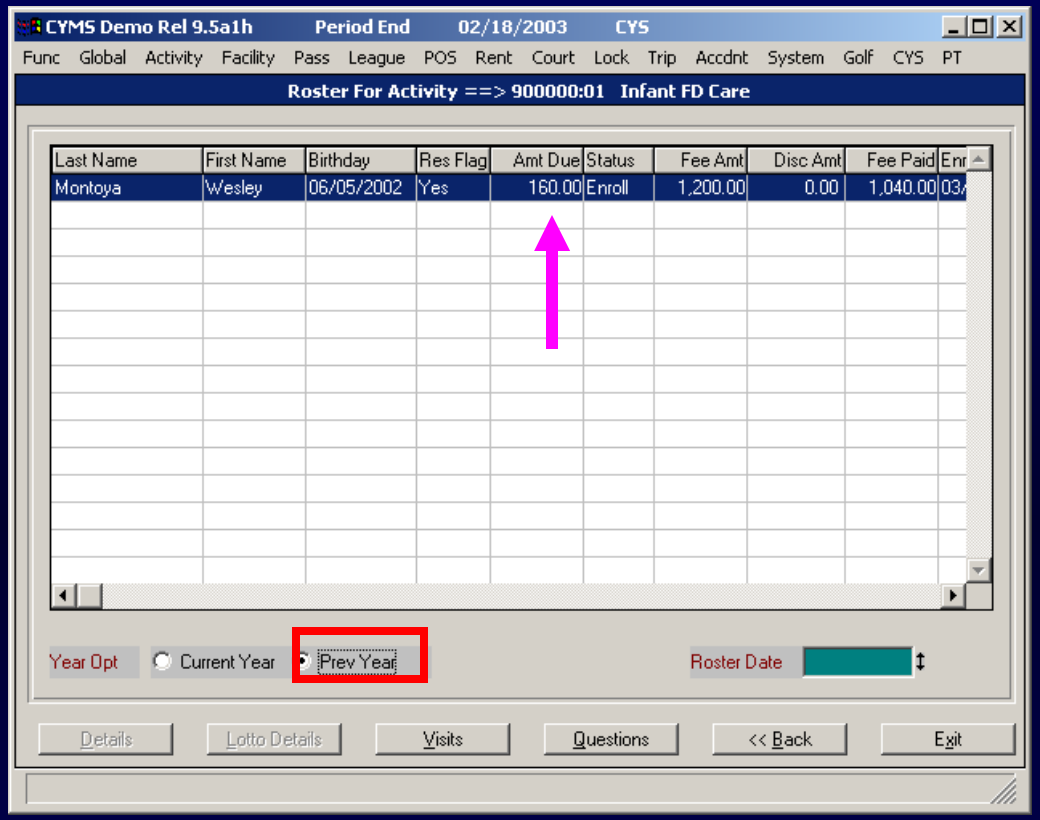

CYMS Demo Rel 9.5a1h
Period End
02/18/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Section Listing
Actv Sec Description Type Stat Lotto Max Cnt Tot Enroll Waitlist Min Cnt Begin Dat
900000 01 Infant FD Care CDC A N 4 3 0 1 12/03/20
900001 01 PreTod FD Care CDC A N 5 5 0 1 11/25/20
900002 01 Tod FD Care CDC A N 8 7 0 1 11/25/20
900003 01 PreSch FD Care CDC A N 10 7 0 1 11/26/20
900013 01 PDPS 2 Day T/TH CDC A N 10 8 0 1 11/26/20
900014 01 PDPS 3 Day M/W/F CDC A N 10 9 0 1 12/20/20
900016 01 CDC Hourly Meal Post CDC A N 0 0 0 0 12/02/20
910001 01 SAS Before School SAS A N 10 8 0 0 12/18/20
910002 01 After School SAS A N 10 10 0 0 12/18/20
910003 01 SAS Camp Wk 1 SAS A N 10 9 0 0 06/02/20
910003 02 SAS Camp Wk 2 SAS A N 10 9 0 0 06/09/20
910003 03 SAS Camp Wk 3 SAS A N 10 9 0 0 06/16/20
910003 04 SAS Camp Wk 4 SAS A N 10 9 0 0 06/23/20
910003 05 SAS Camp Wk 5 SAS A N 10 9 0 0 06/30/20
910003 06 SAS Camp Wk 6 SAS A N 10 9 0 0 07/07/20
910003 07 SAS Camp Wk 7 SAS A N 10 9 0 0 07/14/20
910003 08 SAS Camp Wk 8 SAS A N 10 9 0 0 07/21/20
Details
Roster
Instr
Inc/Exp
Visits
Exit

In the Program Section Listing,
highlight the class you transferred the child from
and click Roster

Example 1: Child PCS'ing – Detail (Step 2)

Note: Since this child owed money for this class, this HH will now have a Previous Balance.

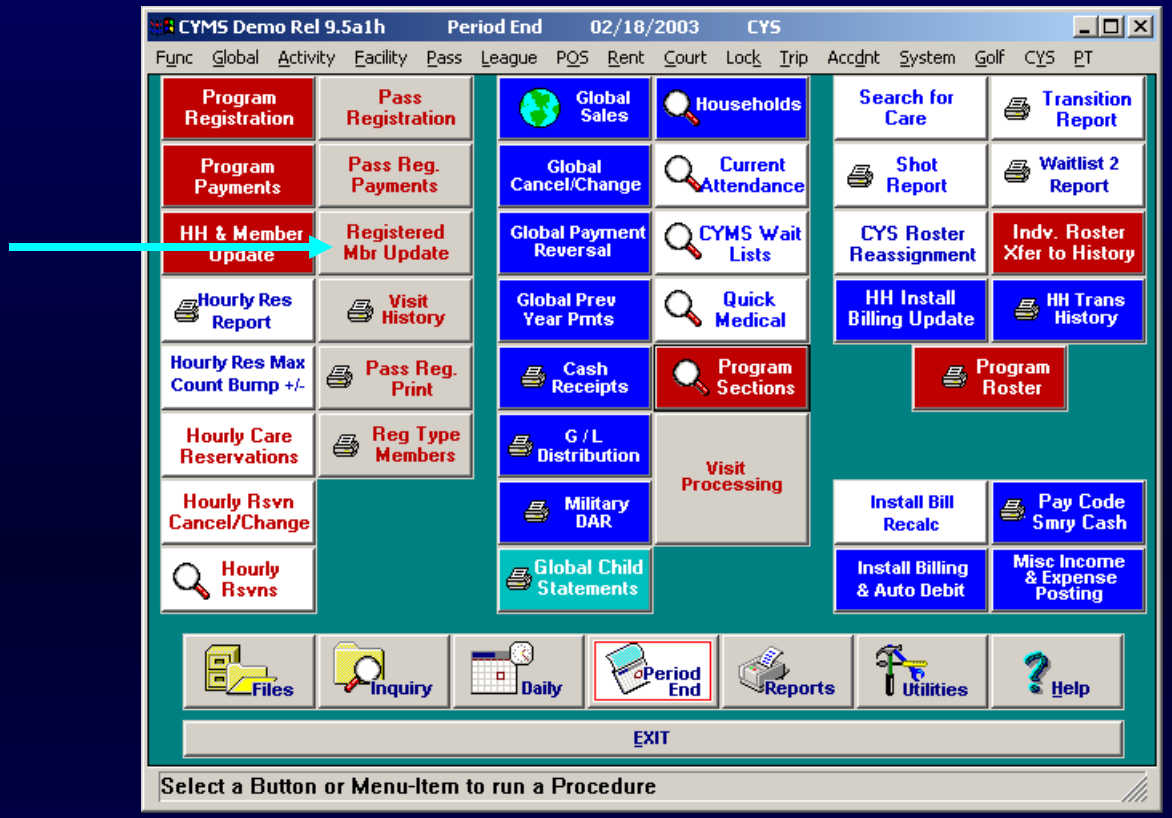
(See Key Points For Details)



. . .But he is on the Previous Year Roster

Notice Wesley is not on the Current Year Roster . . .

Example 1: Child PCS'ing – Detail (Step 3)

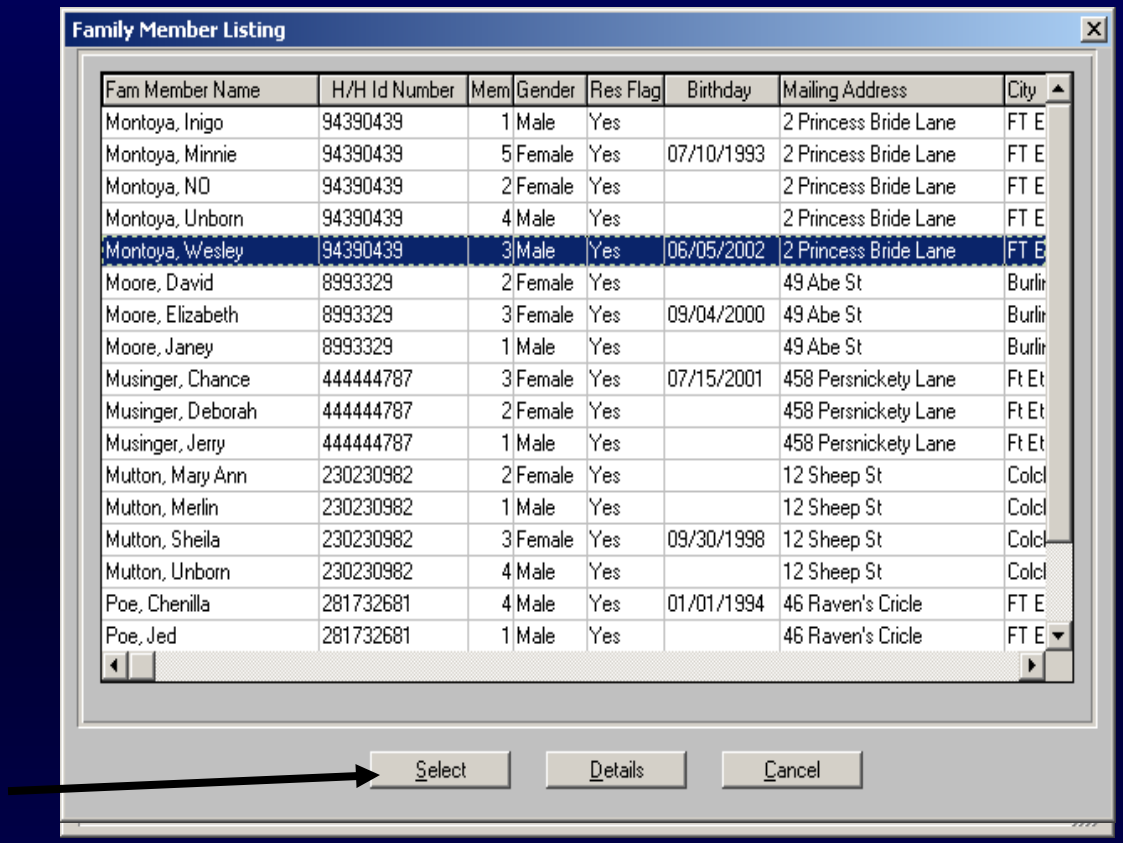


Step 3: Expire the Child's Pass(es)

Click the Registered Member Update button.

(If no button, go to: Files – Pass -- Pass Member Maintenance)

Example 1: Child PCS'ing – Detail (Step 3)

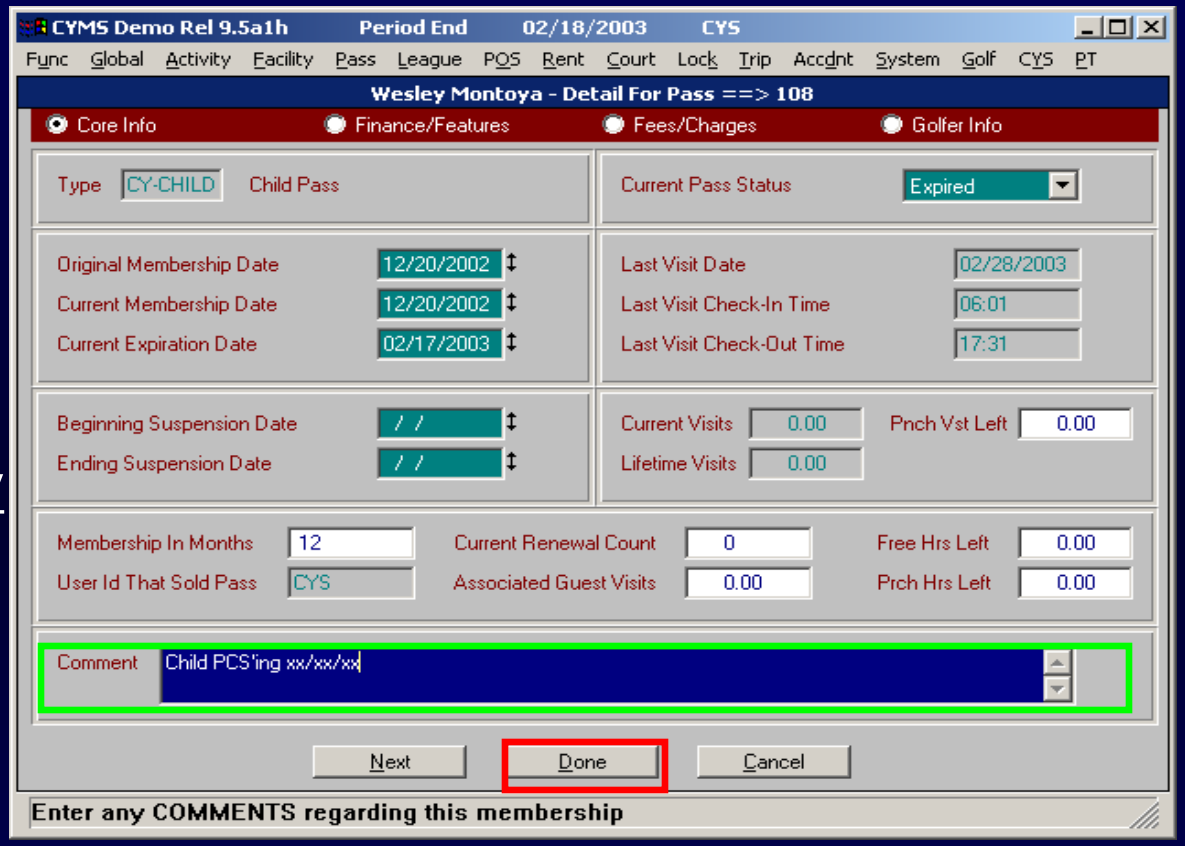

Family Member Listing
Fam Member Name | H/H Id Number | Mem | Gender | Res Flag | Birthday | Mailing Address | City
Montoya, Inigo | 94390439 | 1 | Male | Yes | | 2 Princess Bride Lane | FT E
Montoya, Minnie | 94390439 | 5 | Female | Yes | 07/10/1993 | 2 Princess Bride Lane | FT E
Montoya, NO | 94390439 | 2 | Female | Yes | | 2 Princess Bride Lane | FT E
Montoya, Unborn | 94390439 | 4 | Male | Yes | | 2 Princess Bride Lane | FT E
Montoya, Wesley | 94390439 | 3 | Male | Yes | 06/05/2002 | 2 Princess Bride Lane | FT E
Moore, David | 8993329 | 2 | Female | Yes | | 49 Abe St | Burlir
Moore, Elizabeth | 8993329 | 3 | Female | Yes | 09/04/2000 | 49 Abe St | Burlir
Moore, Janey | 8993329 | 1 | Male | Yes | | 49 Abe St | Burlir
Musinger, Chance | 444444787 | 3 | Female | Yes | 07/15/2001 | 458 Persnickety Lane | Ft Et
Musinger, Deborah | 444444787 | 2 | Female | Yes | | 458 Persnickety Lane | Ft Et
Musinger, Jerry | 444444787 | 1 | Male | Yes | | 458 Persnickety Lane | Ft Et
Mutton, Mary Ann | 230230982 | 2 | Female | Yes | | 12 Sheep St | Colcl
Mutton, Merlin | 230230982 | 1 | Male | Yes | | 12 Sheep St | Colcl
Mutton, Sheila | 230230982 | 3 | Female | Yes | 09/30/1998 | 12 Sheep St | Colcl
Mutton, Unborn | 230230982 | 4 | Male | Yes | | 12 Sheep St | Colcl
Poe, Chenilla | 281732681 | 4 | Male | Yes | 01/01/1994 | 46 Raven's Cricle | FT E
Poe, Jed | 281732681 | 1 | Male | Yes | | 46 Raven's Cricle | FT E
Select
Details
Cancel

Lookup the child...

...and select it!

Example 1: Child PCS'ing – Detail (Step 3)

Change the Current Expiration Date to yesterday's date and the Pass Status to Expired



Highlight the pass you wish to expire and click Select

Make a Comment and click Done

Repeat to expire other passes (CY-MZZ) that belong to this child

Example 1 -- Complete

And that’s it!

Example 2: Detail

Example 2:

A child is transitioning from a

provider's home

to a

center

Example 2: Home To Center - Quick Steps

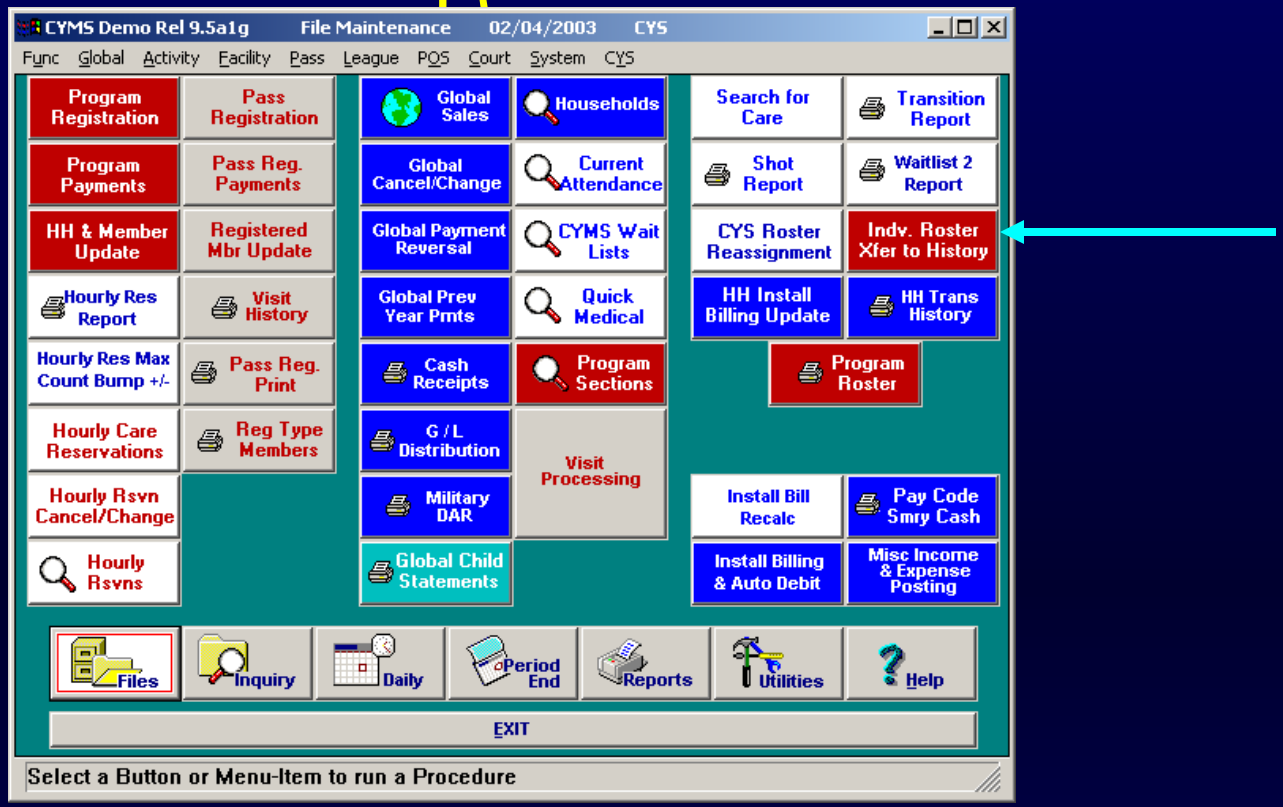
Quick Steps:

1. Roster Transfer To History (Indiv): To move the child from the Current Roster to the Previous Roster (History). This frees up a spot in the provider's home.

2. Global Sales: To enroll the child into his new program

Note: Since no money is transacted in CYMS for FCC, we don't need to adjust fees before transferring the child to history!

Example 2: Home To Center – Detail (Step 1)



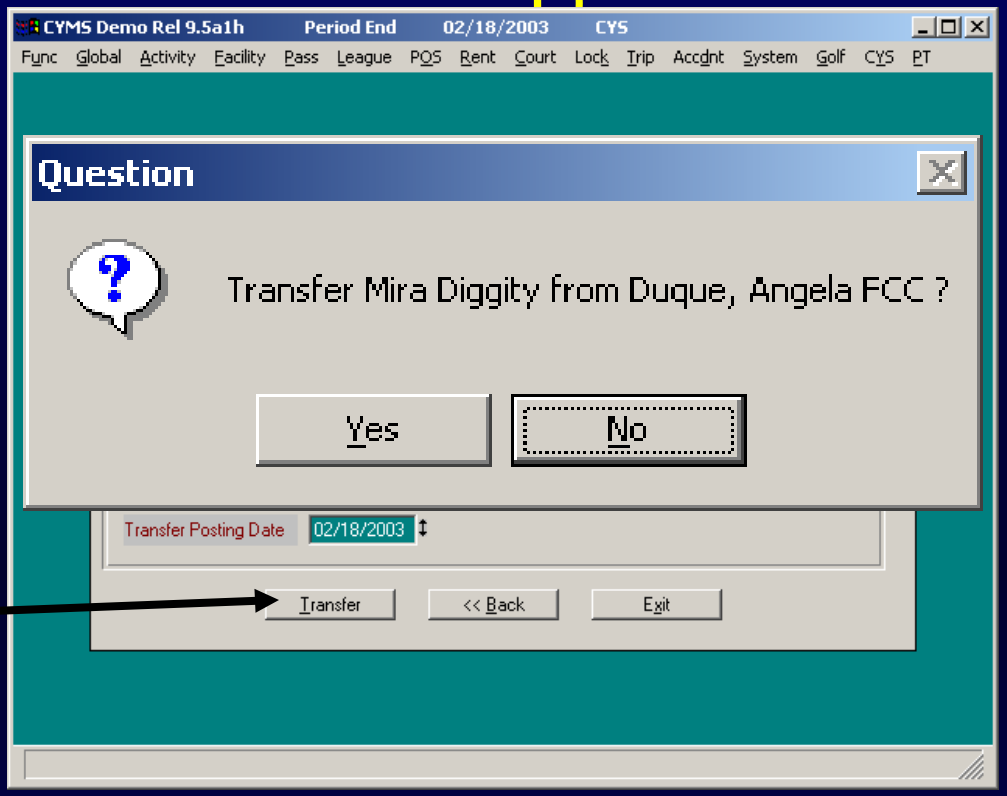
Step 1 -- Move the Child to History

Click the Individual Roster Transfer to History button.

(If no button, go to: Period End – Activity -- Roster Maintenance -- Transfer to History Individual)

Example 2: Home To Center – Detail (Step 1)

..Then click Transfer..



.. and Yes to Continue

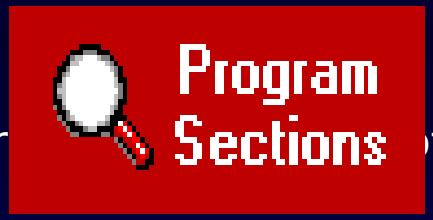
Lookup the household and select it.

Highlight the correct child and the correct provider enrollment ...

Example 2: Home To Center – Detail (Step 1)

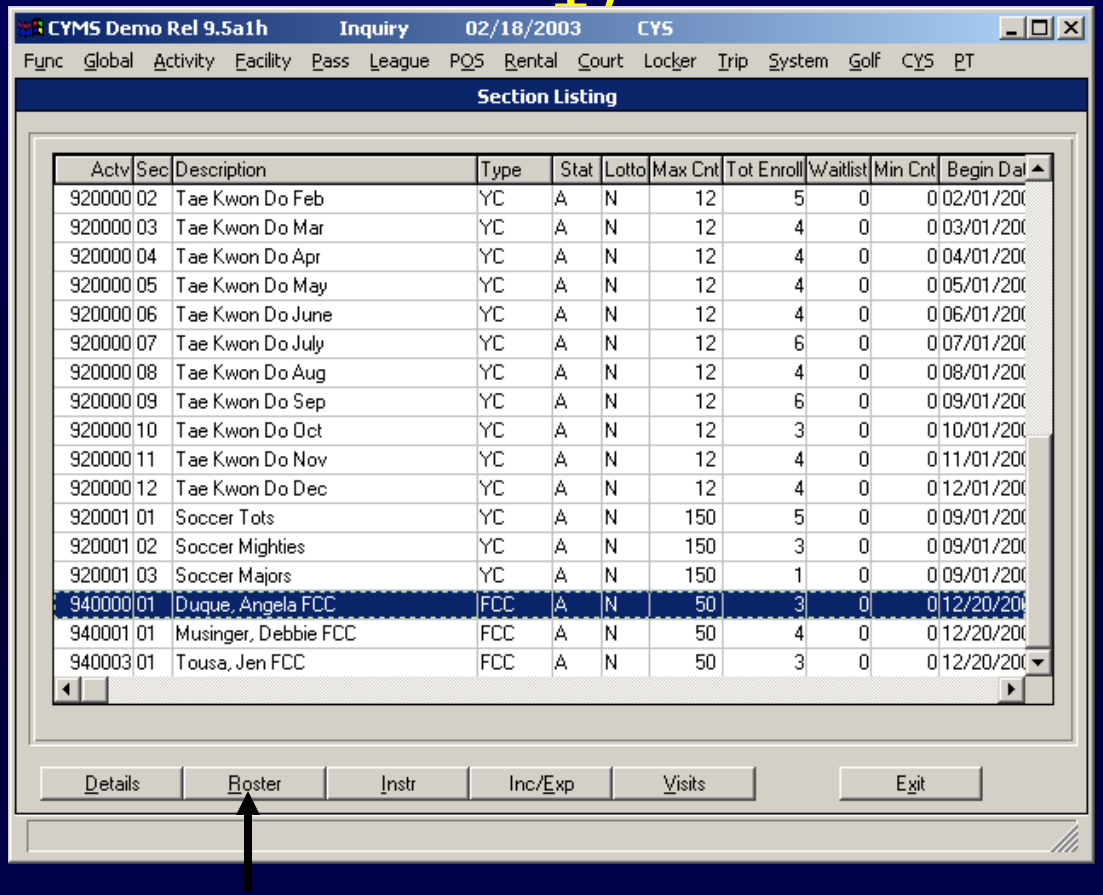
To confirm the child was moved off the Current Roster and into history,

Click the Program Sections button.



Note: You only need to do this if you wish to confir t moved.

Example 2: Home To Center – Detail (Step 1)

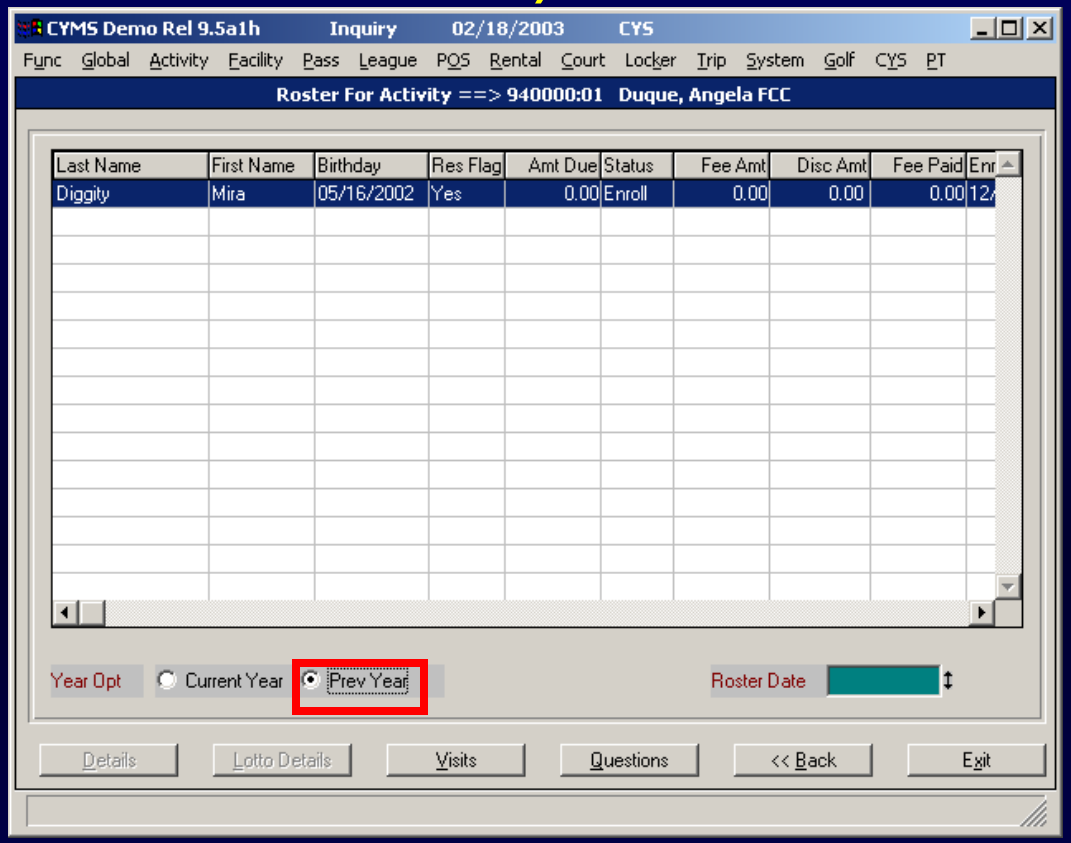

CYMS Demo Rel 9.5a1h Inquiry 02/18/2003 CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Section Listing
Actv Sec Description Type Stat Lotto Max Cnt Tot Enroll Waitlist Min Cnt Begin Dat
920000 02 Tae Kwon Do Feb YC A N 12 5 0 0 02/01/20(
920000 03 Tae Kwon Do Mar YC A N 12 4 0 0 03/01/20(
920000 04 Tae Kwon Do Apr YC A N 12 4 0 0 04/01/20(
920000 05 Tae Kwon Do May YC A N 12 4 0 0 05/01/20(
920000 06 Tae Kwon Do June YC A N 12 4 0 0 06/01/20(
920000 07 Tae Kwon Do July YC A N 12 6 0 0 07/01/20(
920000 08 Tae Kwon Do Aug YC A N 12 4 0 0 08/01/20(
920000 09 Tae Kwon Do Sep YC A N 12 6 0 0 09/01/20(
920000 10 Tae Kwon Do Oct YC A N 12 3 0 0 10/01/20(
920000 11 Tae Kwon Do Nov YC A N 12 4 0 0 11/01/20(
920000 12 Tae Kwon Do Dec YC A N 12 4 0 0 12/01/20(
920001 01 Soccer Tots YC A N 150 5 0 0 09/01/20(
920001 02 Soccer Mighties YC A N 150 3 0 0 09/01/20(
920001 03 Soccer Majors YC A N 150 1 0 0 09/01/20(
940000 01 Duque, Angela FCC FCC A N 50 3 0 0 12/20/20(
940001 01 Musinger, Debbie FCC FCC A N 50 4 0 0 12/20/20(
940003 01 Tousa, Jen FCC FCC A N 50 3 0 0 12/20/20(
Details
Roster
Instr
Inc/Exp
Visits
Exit

Highlight the class you transferred the child from

and

Click Roster

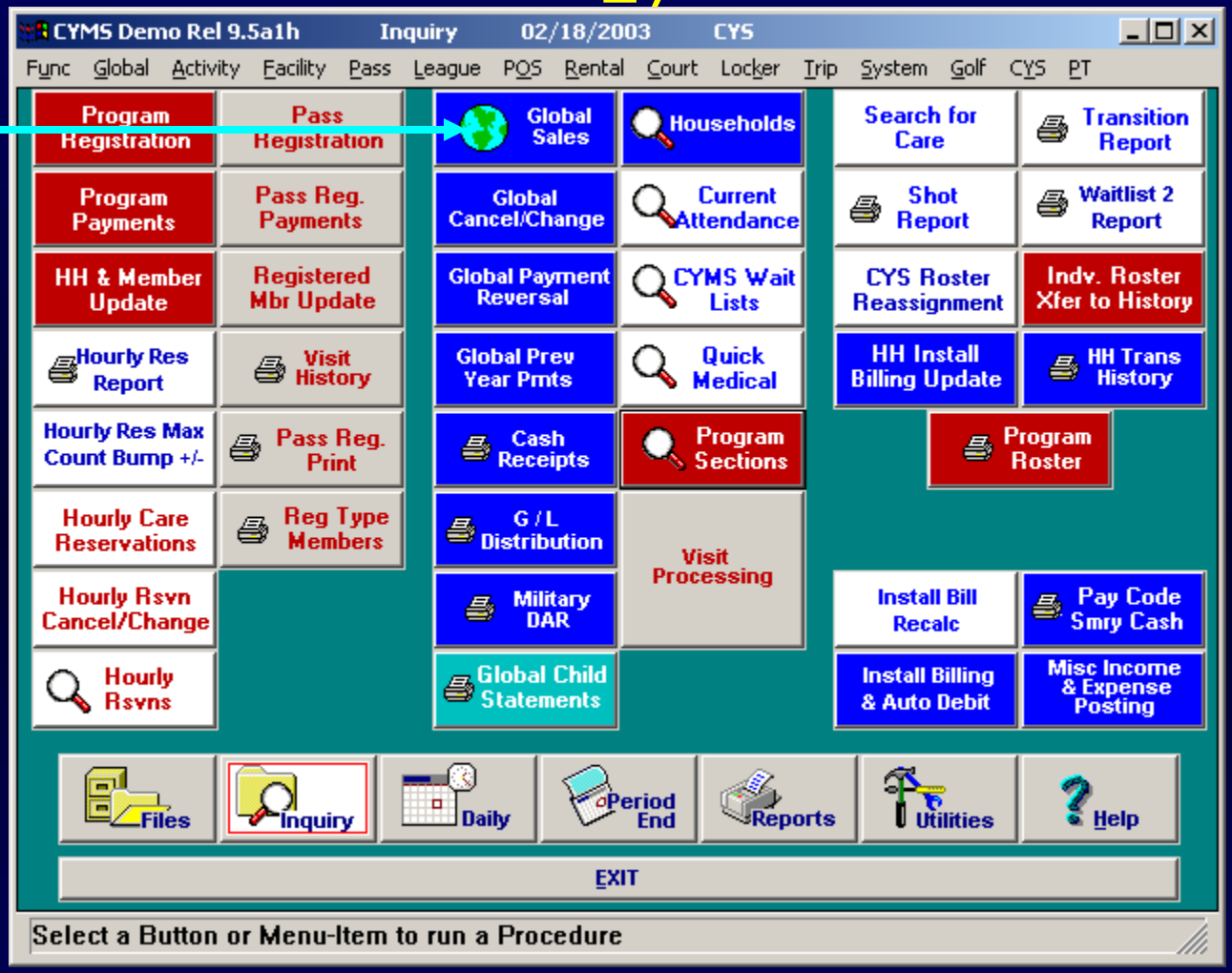
Example 2: Home To Center – Detail (Step 1)



...But she is on the Previous Year Roster

Notice Mira is <u>not</u> on the Current Roster...

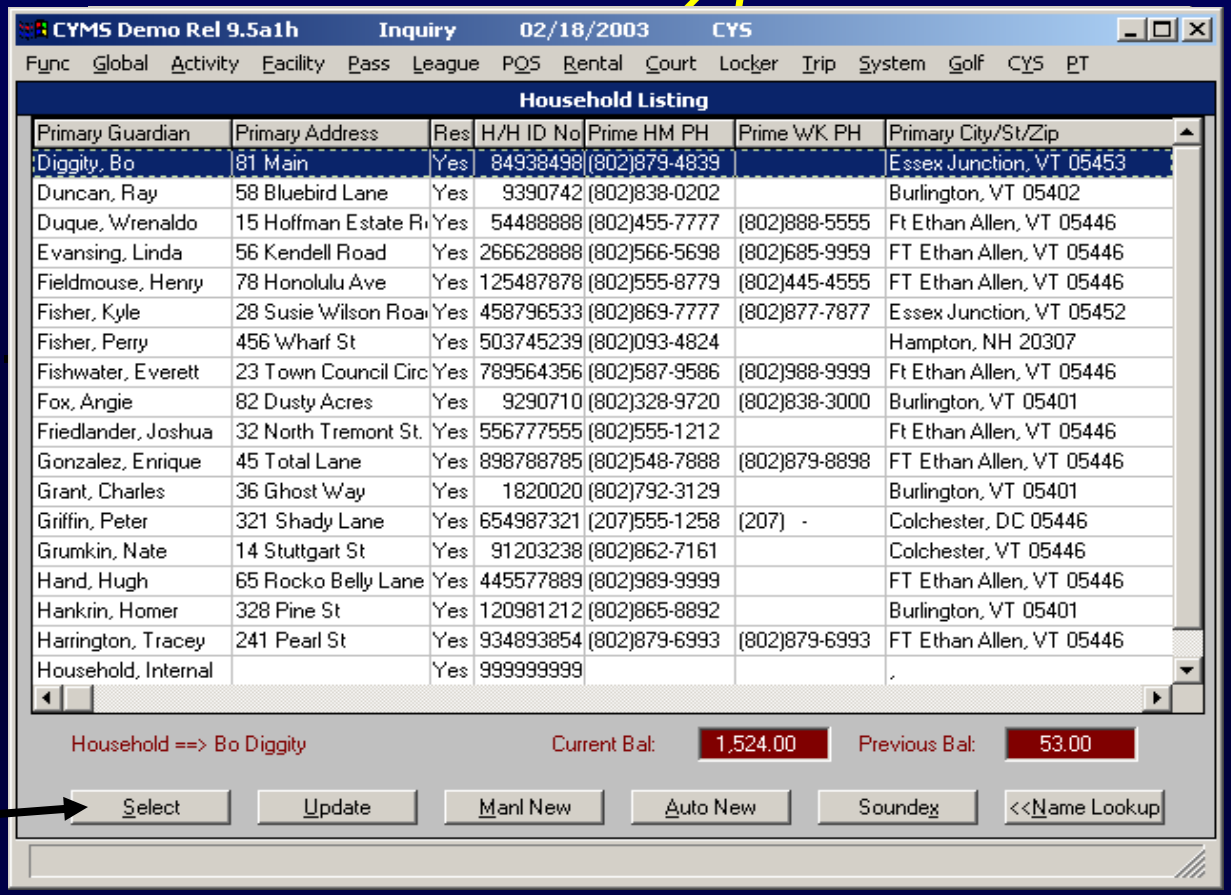
Example 2: Home To Center – Detail (Step 2)



Step 2: Enroll the Child into Her New Class

Click Global Sales

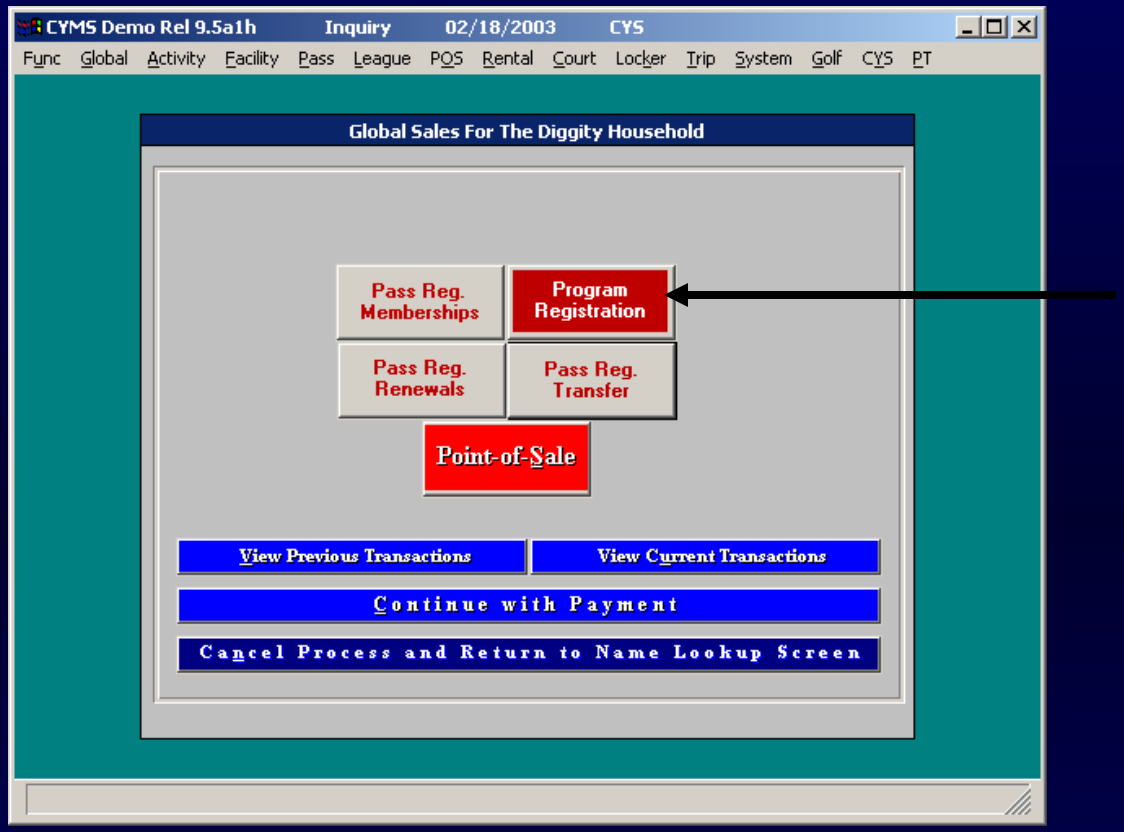
Example 2: Home To Center – Detail (Step 2)


CYMS Demo Rel 9.5a1h Inquiry 02/18/2003 CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Household Listing
Primary Guardian | Primary Address | Res | H/H ID No | Prime HM PH | Prime WK PH | Primary City/St/Zip
Diggity, Bo | 81 Main | Yes | 84938498 | (802)879-4839 | | Essex Junction, VT 05453
Duncan, Ray | 58 Bluebird Lane | Yes | 9390742 | (802)838-0202 | | Burlington, VT 05402
Duque, Wrenaldo | 15 Hoffman Estate Ri | Yes | 54488888 | (802)455-7777 | (802)888-5555 | Ft Ethan Allen, VT 05446
Evansing, Linda | 56 Kendell Road | Yes | 266628888 | (802)566-5698 | (802)685-9959 | FT Ethan Allen, VT 05446
Fieldmouse, Henry | 78 Honolulu Ave | Yes | 125487878 | (802)555-8779 | (802)445-4555 | FT Ethan Allen, VT 05446
Fisher, Kyle | 28 Susie Wilson Roa | Yes | 458796533 | (802)869-7777 | (802)877-7877 | Essex Junction, VT 05452
Fisher, Perry | 456 Wharf St | Yes | 503745239 | (802)093-4824 | | Hampton, NH 20307
Fishwater, Everett | 23 Town Council Circ | Yes | 789564356 | (802)587-9586 | (802)988-9999 | Ft Ethan Allen, VT 05446
Fox, Angie | 82 Dusty Acres | Yes | 9290710 | (802)328-9720 | (802)838-3000 | Burlington, VT 05401
Friedlander, Joshua | 32 North Tremont St. | Yes | 556777555 | (802)555-1212 | | Ft Ethan Allen, VT 05446
Gonzalez, Enrique | 45 Total Lane | Yes | 898788785 | (802)548-7888 | (802)879-8898 | FT Ethan Allen, VT 05446
Grant, Charles | 36 Ghost Way | Yes | 1820020 | (802)792-3129 | | Burlington, VT 05401
Griffin, Peter | 321 Shady Lane | Yes | 654987321 | (207)555-1258 | (207) - | Colchester, DC 05446
Grumkin, Nate | 14 Stuttgart St | Yes | 91203238 | (802)862-7161 | | Colchester, VT 05446
Hand, Hugh | 65 Rocko Belly Lane | Yes | 445577889 | (802)989-9999 | | FT Ethan Allen, VT 05446
Hankrin, Homer | 328 Pine St | Yes | 120981212 | (802)865-8892 | | Burlington, VT 05401
Harrington, Tracey | 241 Pearl St | Yes | 934893854 | (802)879-6993 | (802)879-6993 | FT Ethan Allen, VT 05446
Household, Internal | | Yes | 999999999 | | | ,
Household ==> Bo Diggity
Current Bal: 1,524.00
Previous Bal: 53.00
Select
Update
Manl New
Auto New
Soundex
<<Name Lookup

Lookup the Household...

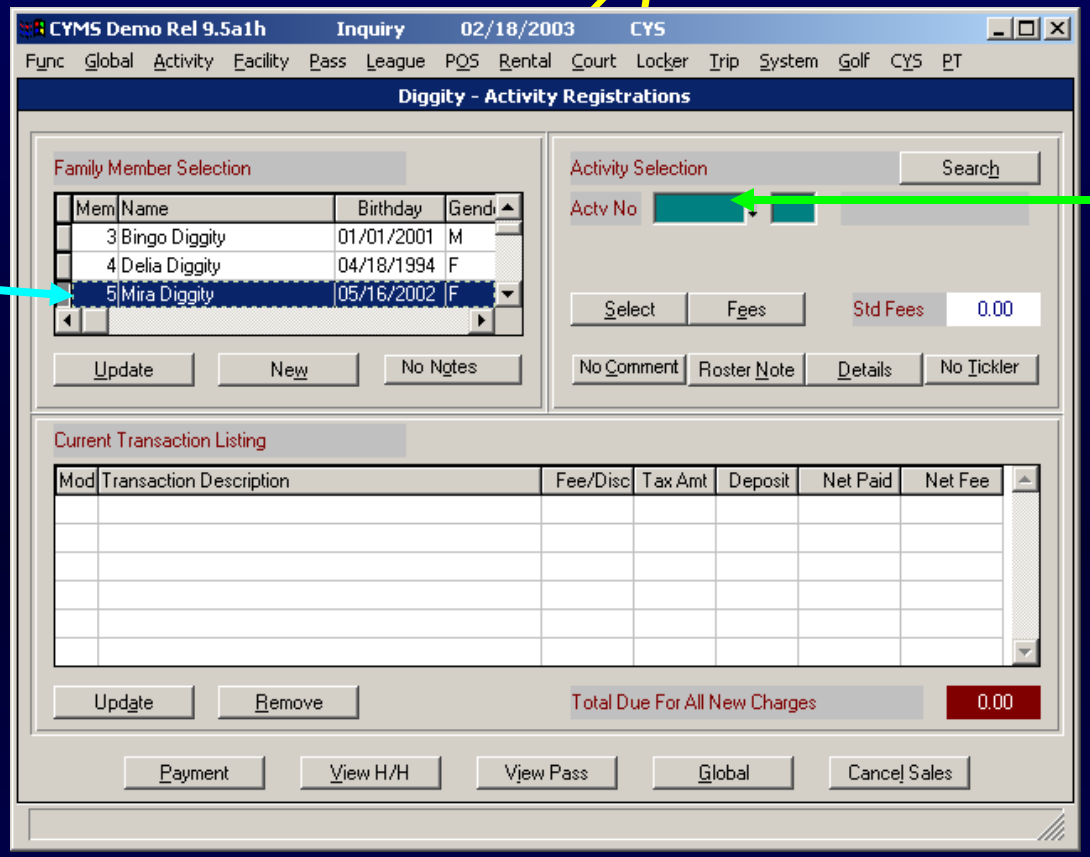
...and select it!

Example 2: Home To Center – Detail (Step 2)



Click Program Registration

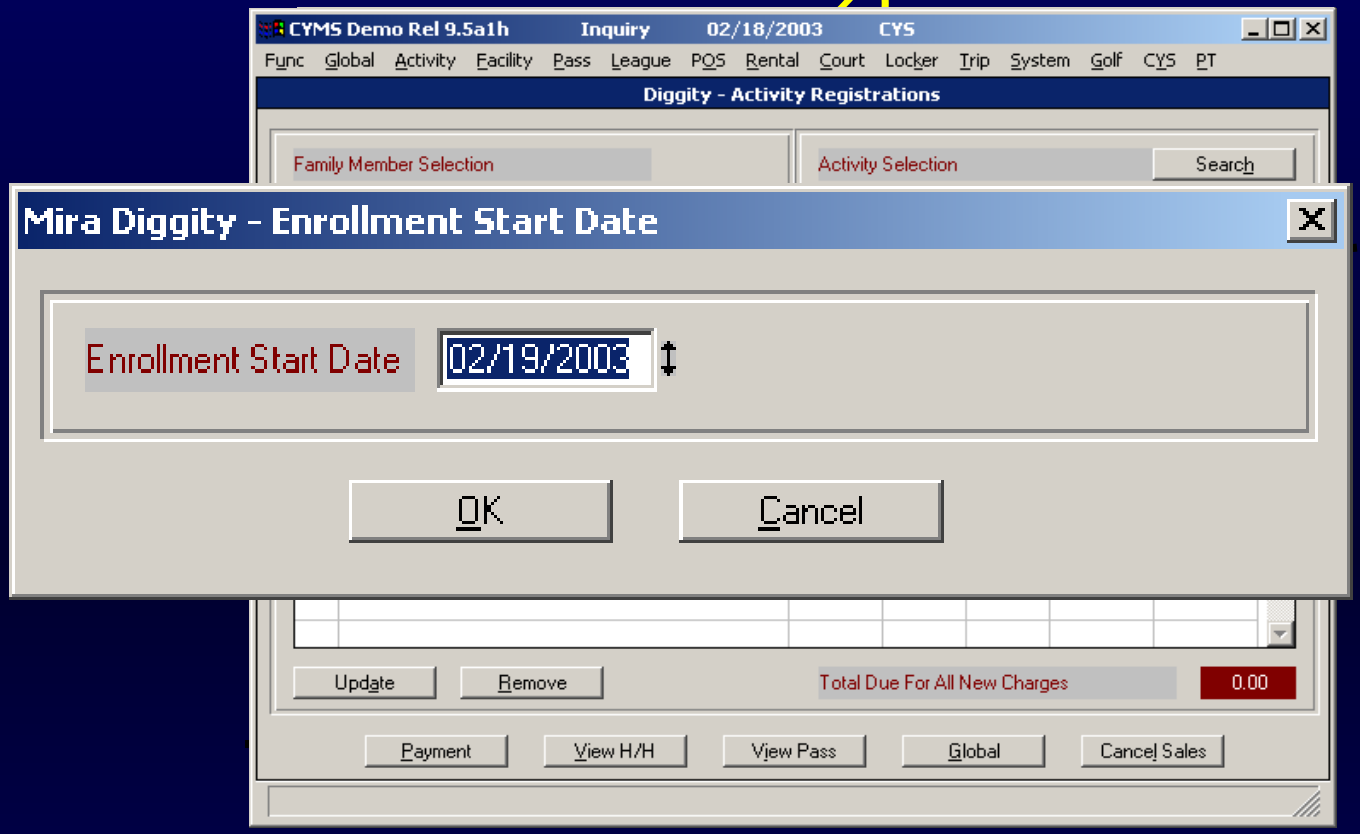
Example 2: Home To Center – Detail (Step 2)


CYMS Demo Rel 9.5a1h
Inquiry
02/18/2003
CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Diggity - Activity Registrations
Family Member Selection
Mem Name Birthday Gend
3 Bingo Diggity 01/01/2001 M
4 Delia Diggity 04/18/1994 F
5 Mira Diggity 05/16/2002 F
Update New No Notes
Activity Selection
Search
Actv No
Select Fees
Std Fees 0.00
No Comment Roster Note Details No Tickler
Current Transaction Listing
Mod Transaction Description Fee/Disc Tax Amt Deposit Net Paid Net Fee
Update Remove
Total Due For All New Charges 0.00
Payment View H/H View Pass Global Cancel Sales

Highlight the child…

…And Right Click to find the class

Example 2: Home To Center – Detail (Step 2)



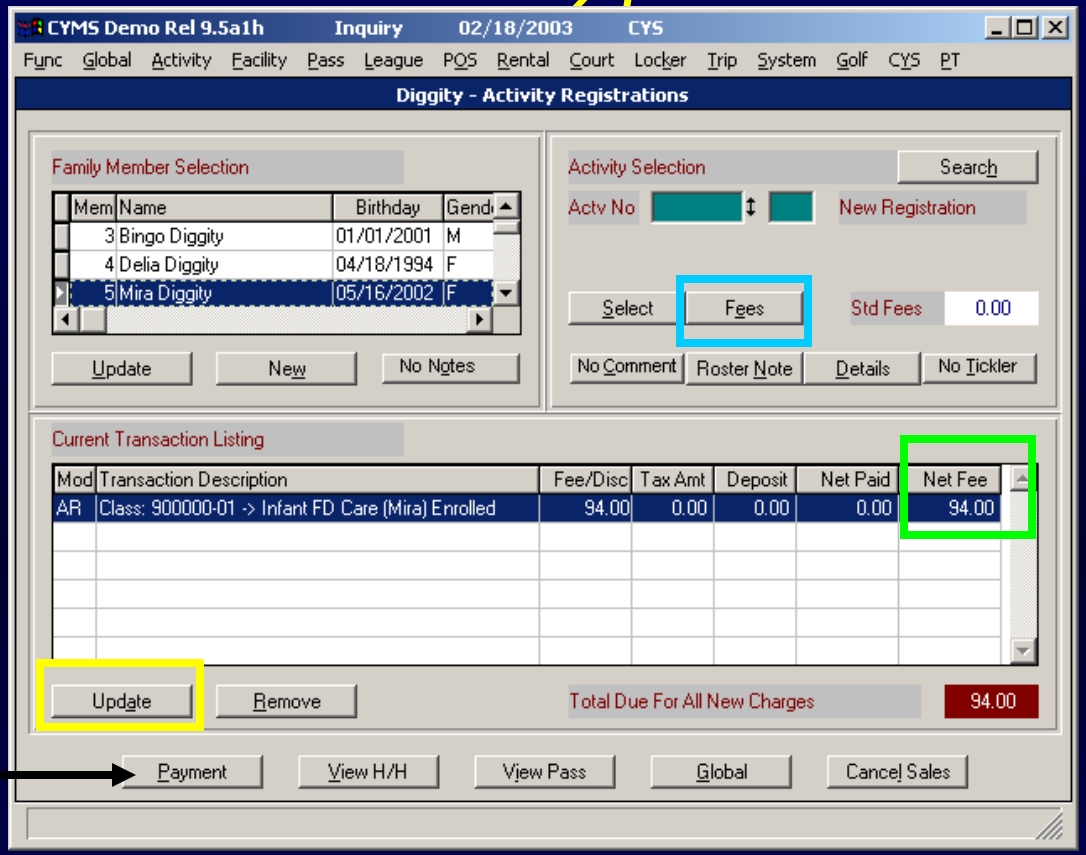
Highlight the new class and select it

Click the Select button

Start Date:

Put the date the child is starting in the new program and click OK

Example 2: Home To Center – Detail (Step 2)



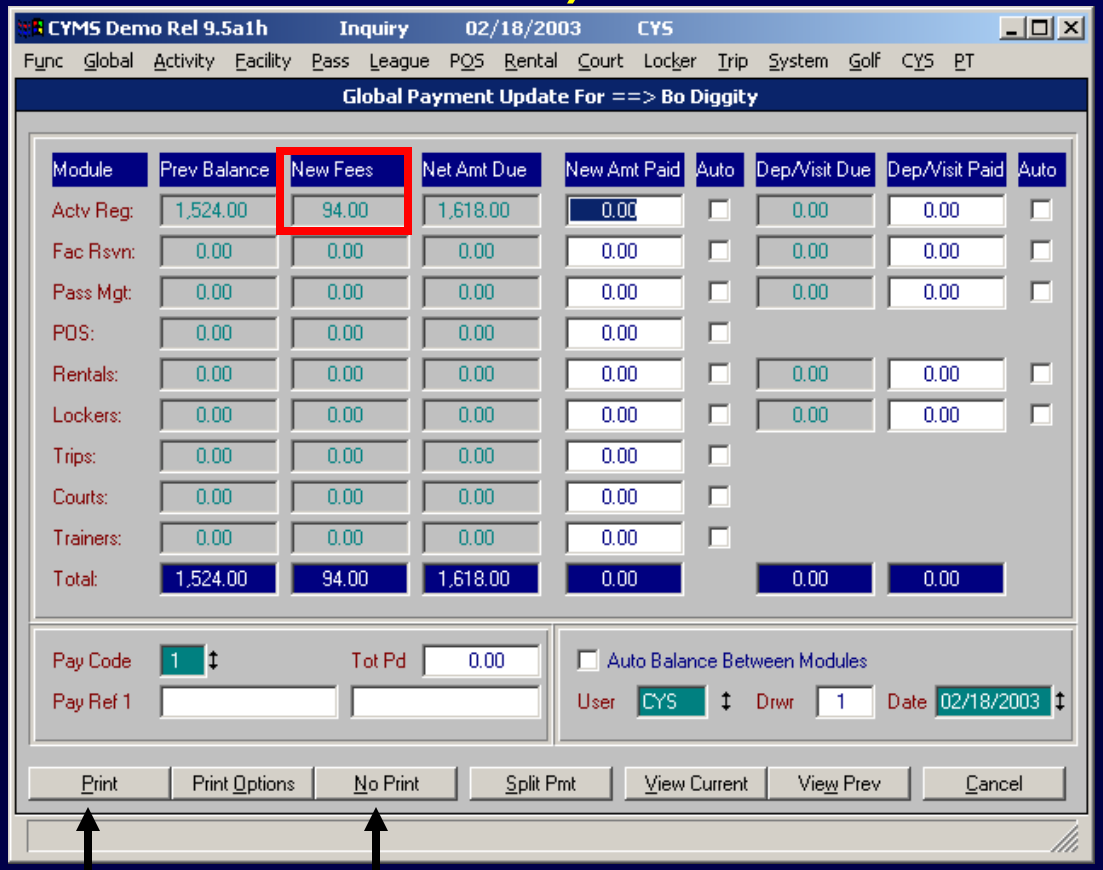
Otherwise Click Payment to finish

The system automatically pro-rates the fee from the day you selected to the end of that month.

If you DON'T like the pro-rated amount, you can click Update, then Fees, adjust the Fee Amount and click OK

Example 2: Home To Center – Detail (Step 2)

Prorated amount until the end of the month


CYMS Demo Rel 9.5a1h Inquiry 02/18/2003 CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Global Payment Update For ==> Bo Diggity
Module Prev Balance New Fees Net Amt Due New Amt Paid Auto Dep/Visit Due Dep/Visit Paid Auto
Actv Reg: 1,524.00 94.00 1,618.00 0.00
Fac Rsvn: 0.00 0.00 0.00 0.00
Pass Mgt: 0.00 0.00 0.00 0.00
POS: 0.00 0.00 0.00 0.00
Rentals: 0.00 0.00 0.00 0.00
Lockers: 0.00 0.00 0.00 0.00
Trips: 0.00 0.00 0.00 0.00
Courts: 0.00 0.00 0.00 0.00
Trainers: 0.00 0.00 0.00 0.00
Total: 1,524.00 94.00 1,618.00 0.00 0.00 0.00
Pay Code 1 Tot Pd 0.00
Pay Ref 1
Auto Balance Between Modules
User CYS Drwr 1 Date 02/18/2003
Print Print Options No Print Split Pmt View Current View Prev Cancel

Click Print or No Print to finish

If the child started on the 20th, it prorates until the 31st.

If the child started on the 5th it also prorates until the 31st.

The first Installment Bill always comes the 1st of a month. It never starts on the 15th.

Example 3: Detail

Example 3:

A child is transitioning from

CDC to SAS

or

from one CDC to a different CDC

(crossing cost centers)

Example 3: Crossing Cost Centers - Quick Steps

1. Global Cancel Change: This process is used to adjust the household's fees before the child is moved to history.

2. Roster Transfer To History (Indiv): This process moves the child from the Current Roster to the Previous Roster (History). This prevents them from being billed for a class they are no longer in.

3. Global Sales: To enroll the child into his new program

4. Pass Transfer: Only applicable if going from CDC to SAS

Example 3: Crossing Cost Centers – CDC to SAS (Steps 1-3)

The first 3 steps of this process have already been covered in prior examples, please refer to:

Step 1: Update the Household's Fees (Slides 3-12)

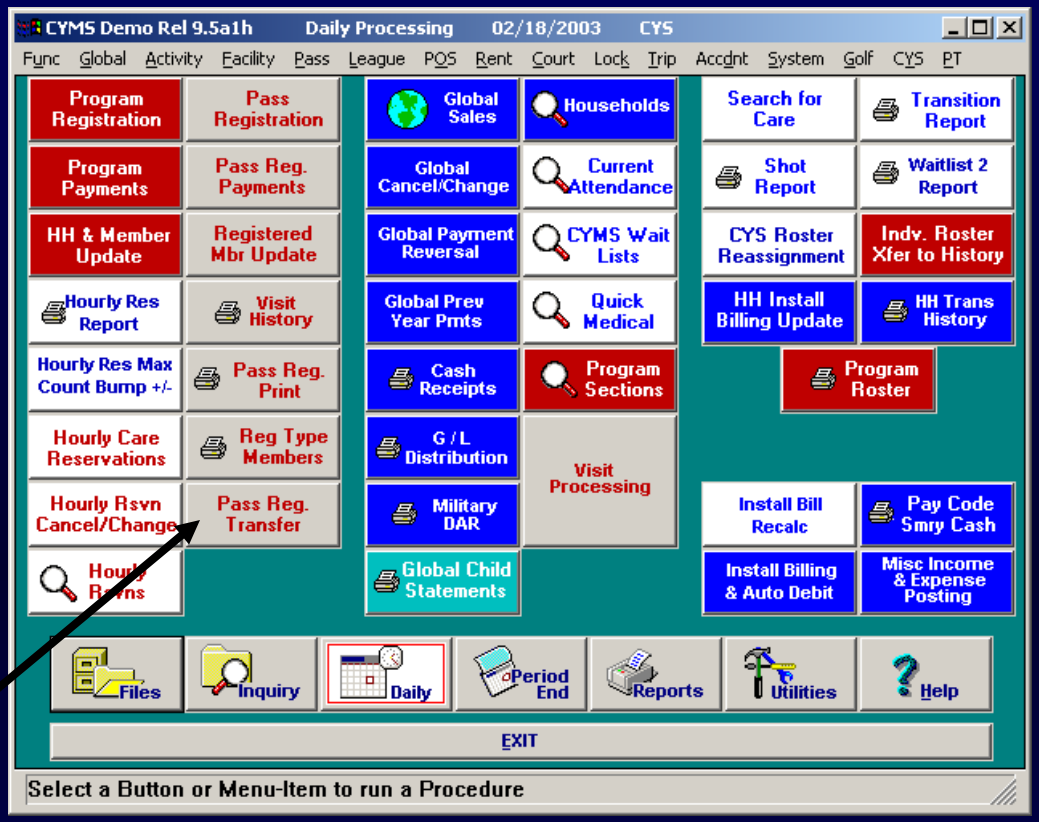
Step 2: Transfer the Child to History (Slides 13-17)

Step 3: Enroll the Child in His New Program (Slides 29-35)

Example 3: Crossing Cost Centers (Step 4)

Click the Pass Transfer button.

(If you don't have a button, go to: Daily – Pass – Pass Transfer)

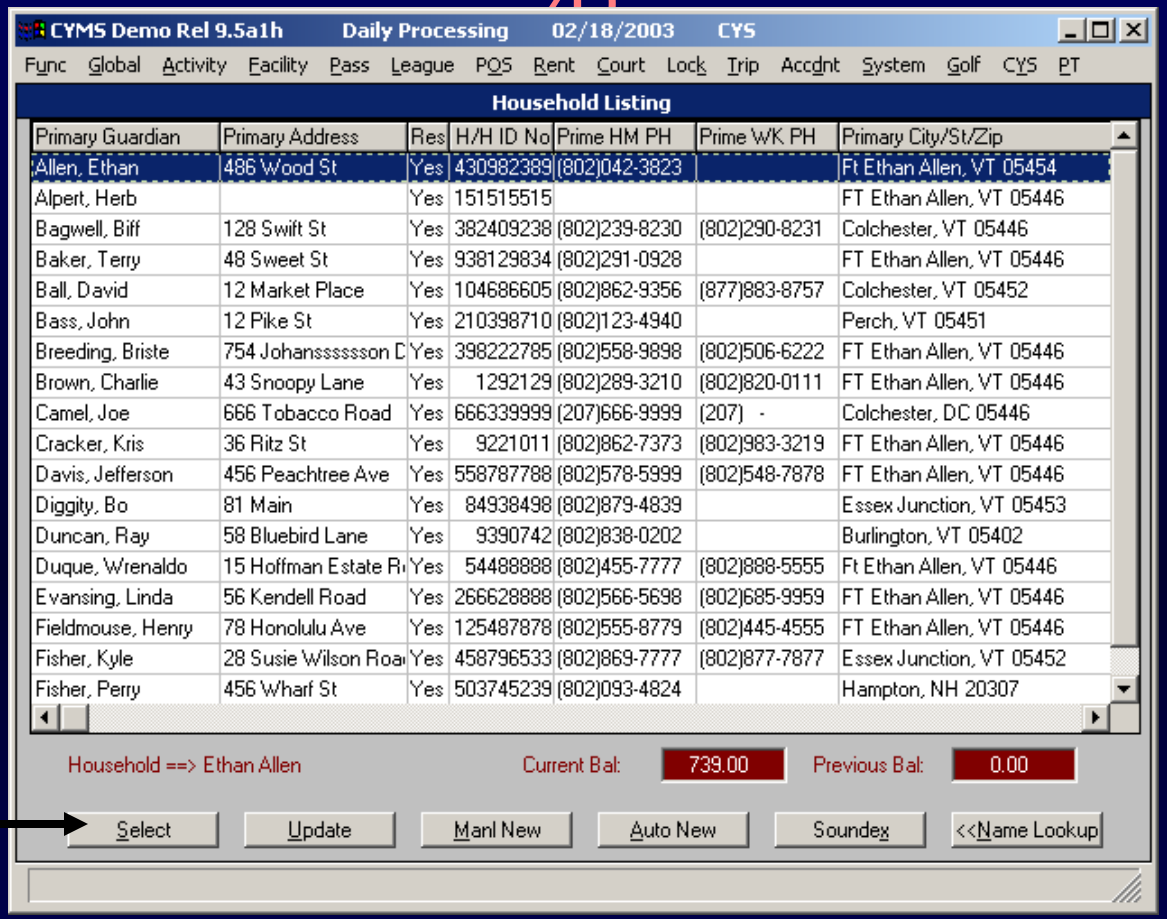


Step 4: Pass Transfer

This step is only necessary if going from CDC to SAS.

Children cannot have both a SAS and a Child pass or you may experience annual report or USDA problems.

Example 3: Crossing Cost Centers (Step 4)

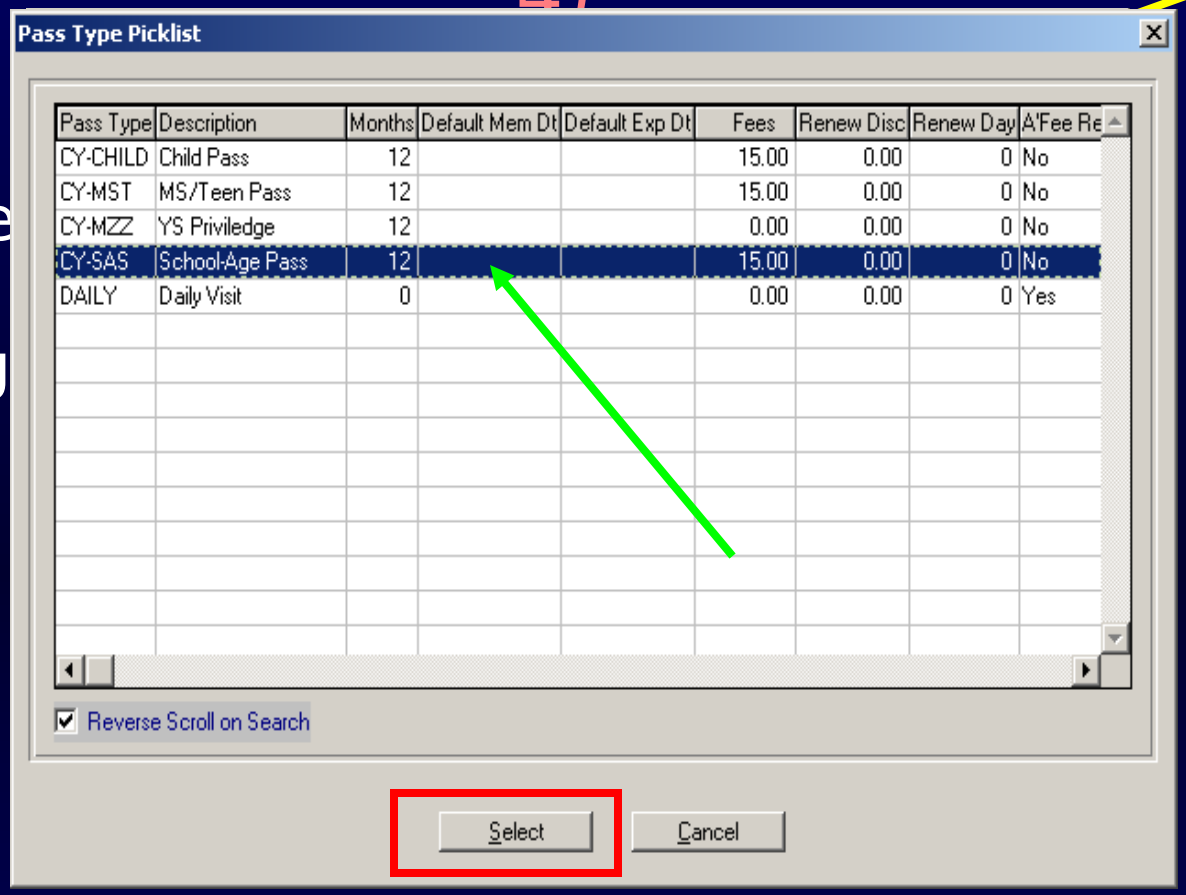

CYMS Demo Rel 9.5a1h
Daily Processing
02/18/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Household Listing
Primary Guardian | Primary Address | Res | H/H ID No | Prime HM PH | Prime WK PH | Primary City/St/Zip
Allen, Ethan | 486 Wood St | Yes | 430982389 | (802)042-3823 | | Ft Ethan Allen, VT 05454
Alpert, Herb | | Yes | 151515515 | | | FT Ethan Allen, VT 05446
Bagwell, Biff | 128 Swift St | Yes | 382409238 | (802)239-8230 | (802)290-8231 | Colchester, VT 05446
Baker, Terry | 48 Sweet St | Yes | 938129834 | (802)291-0928 | | FT Ethan Allen, VT 05446
Ball, David | 12 Market Place | Yes | 104686605 | (802)862-9356 | (877)883-8757 | Colchester, VT 05452
Bass, John | 12 Pike St | Yes | 210398710 | (802)123-4940 | | Perch, VT 05451
Breeding, Briste | 754 Johanssssson D | Yes | 398222785 | (802)558-9898 | (802)506-6222 | FT Ethan Allen, VT 05446
Brown, Charlie | 43 Snoopy Lane | Yes | 1292129 | (802)289-3210 | (802)820-0111 | FT Ethan Allen, VT 05446
Camel, Joe | 666 Tobacco Road | Yes | 666339999 | (207)666-9999 | (207) - | Colchester, DC 05446
Cracker, Kris | 36 Ritz St | Yes | 9221011 | (802)862-7373 | (802)983-3219 | FT Ethan Allen, VT 05446
Davis, Jefferson | 456 Peachtree Ave | Yes | 558787788 | (802)578-5999 | (802)548-7878 | FT Ethan Allen, VT 05446
Diggity, Bo | 81 Main | Yes | 84938498 | (802)879-4839 | | Essex Junction, VT 05453
Duncan, Ray | 58 Bluebird Lane | Yes | 9390742 | (802)838-0202 | | Burlington, VT 05402
Duque, Wrenaldo | 15 Hoffman Estate R | Yes | 54488888 | (802)455-7777 | (802)888-5555 | Ft Ethan Allen, VT 05446
Evansing, Linda | 56 Kendell Road | Yes | 266628888 | (802)566-5698 | (802)685-9959 | FT Ethan Allen, VT 05446
Fieldmouse, Henry | 78 Honolulu Ave | Yes | 125487878 | (802)555-8779 | (802)445-4555 | FT Ethan Allen, VT 05446
Fisher, Kyle | 28 Susie Wilson Roa | Yes | 458796533 | (802)869-7777 | (802)877-7877 | Essex Junction, VT 05452
Fisher, Perry | 456 Wharf St | Yes | 503745239 | (802)093-4824 | | Hampton, NH 20307
Household ==> Ethan Allen
Current Bal: 739.00
Previous Bal: 0.00
Select
Update
Manl New
Auto New
Soundex
<<Name Lookup

Lookup the household...

...and select it!

Example 3: Crossing Cost Centers (Step 4)

Highlight the child who is transitioning from CDC (CY-Child Pass) to School Age

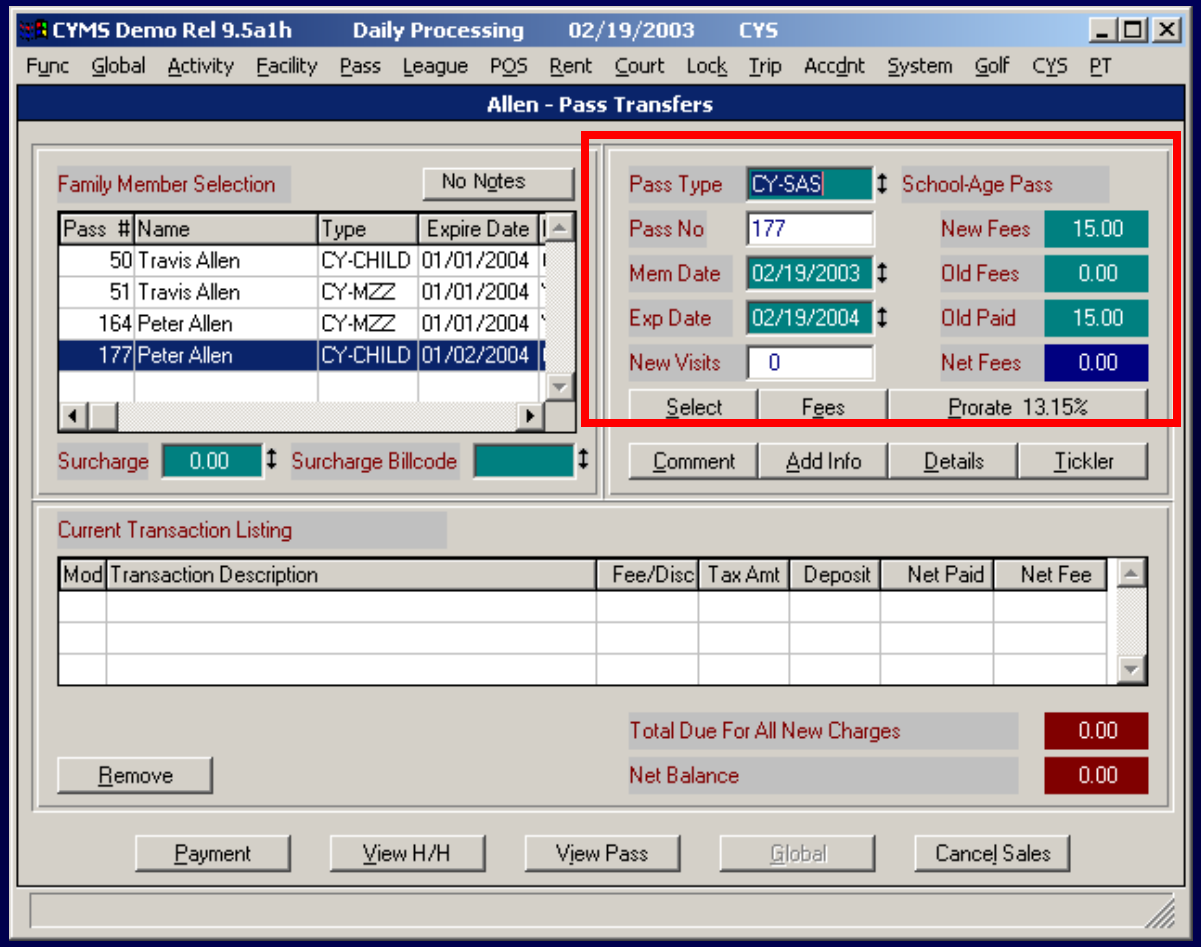

Pass Type Picklist
Pass Type | Description | Months | Default Mem Dt | Default Exp Dt | Fees | Renew Disc | Renew Day | A'Fee Re
CY-CHILD | Child Pass | 12 | | | 15.00 | 0.00 | 0 | No
CY-MST | MS/Teen Pass | 12 | | | 15.00 | 0.00 | 0 | No
CY-MZZ | YS Priviledge | 12 | | | 0.00 | 0.00 | 0 | No
CY-SAS | School-Age Pass | 12 | | | 15.00 | 0.00 | 0 | No
DAILY | Daily Visit | 0 | | | 0.00 | 0.00 | 0 | Yes
Reverse Scroll on Search
Select
Cancel

Right Click in the Pass Type box

…Highlight the SAS Pass (CY-SAS)

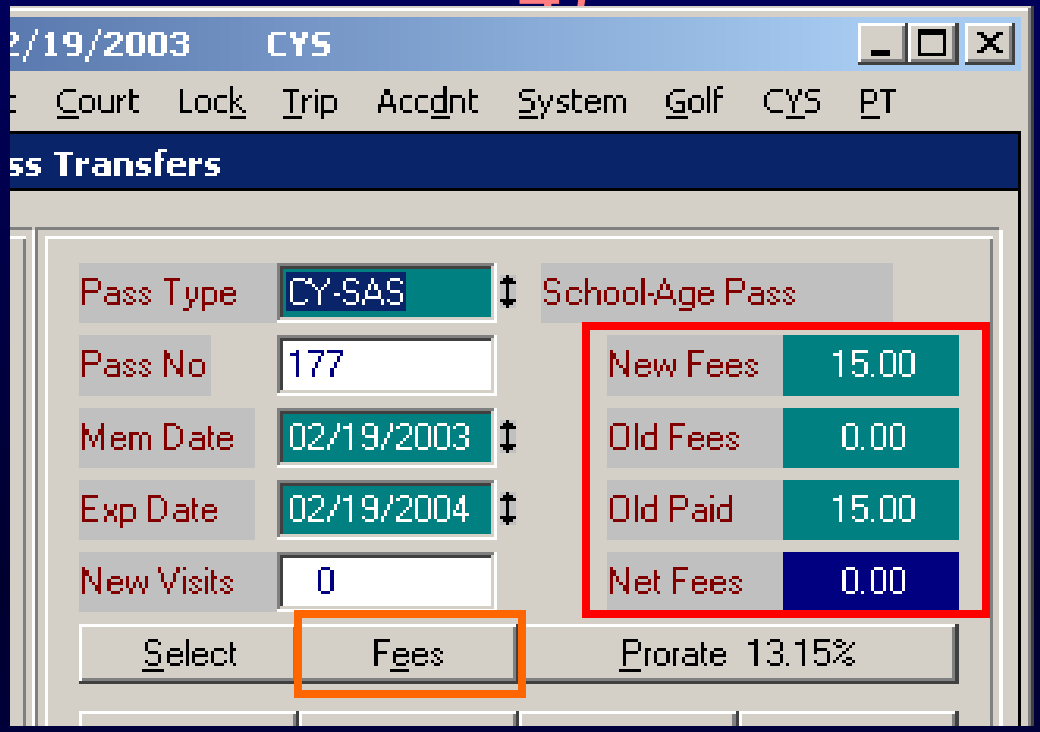
and click Select

Example 3: Crossing Cost Centers (Step 4)



Before proceeding, you need to really understand this block of information !

Example 3: Crossing Cost Centers (Step 4)



If the Net Fee isn't zero, you may need to click Fees and adjust the Fee Amount accordingly

New Fees = Fees for the new pass (here, the SAS Pass)

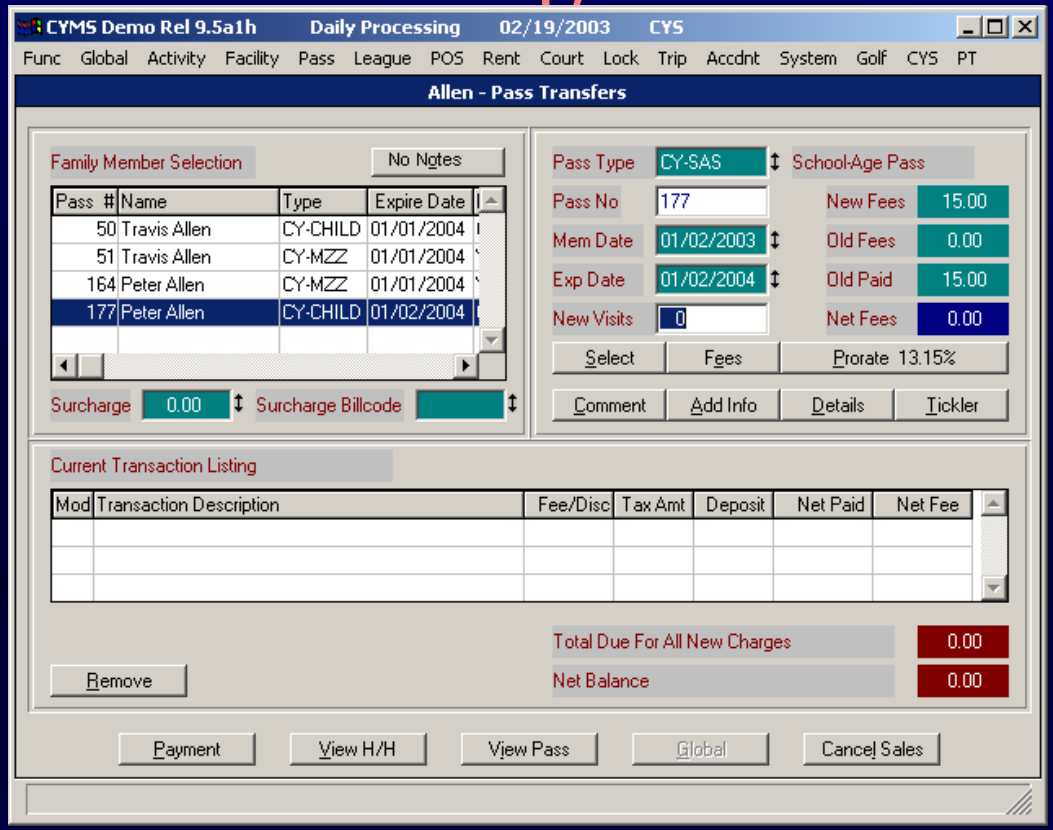
Old Fees = Registration Fees owed on the From Pass (in this case the child pass).

Old Paid = Registration Fees paid on the From Pass (in this case the child pass).

Net Fees = New charges for this transfer. Since this is not a re-registration, you want this to be

Example 3: Crossing Cost Centers (Step 4)

Example : The current Child Pass expires on 1/2/2004



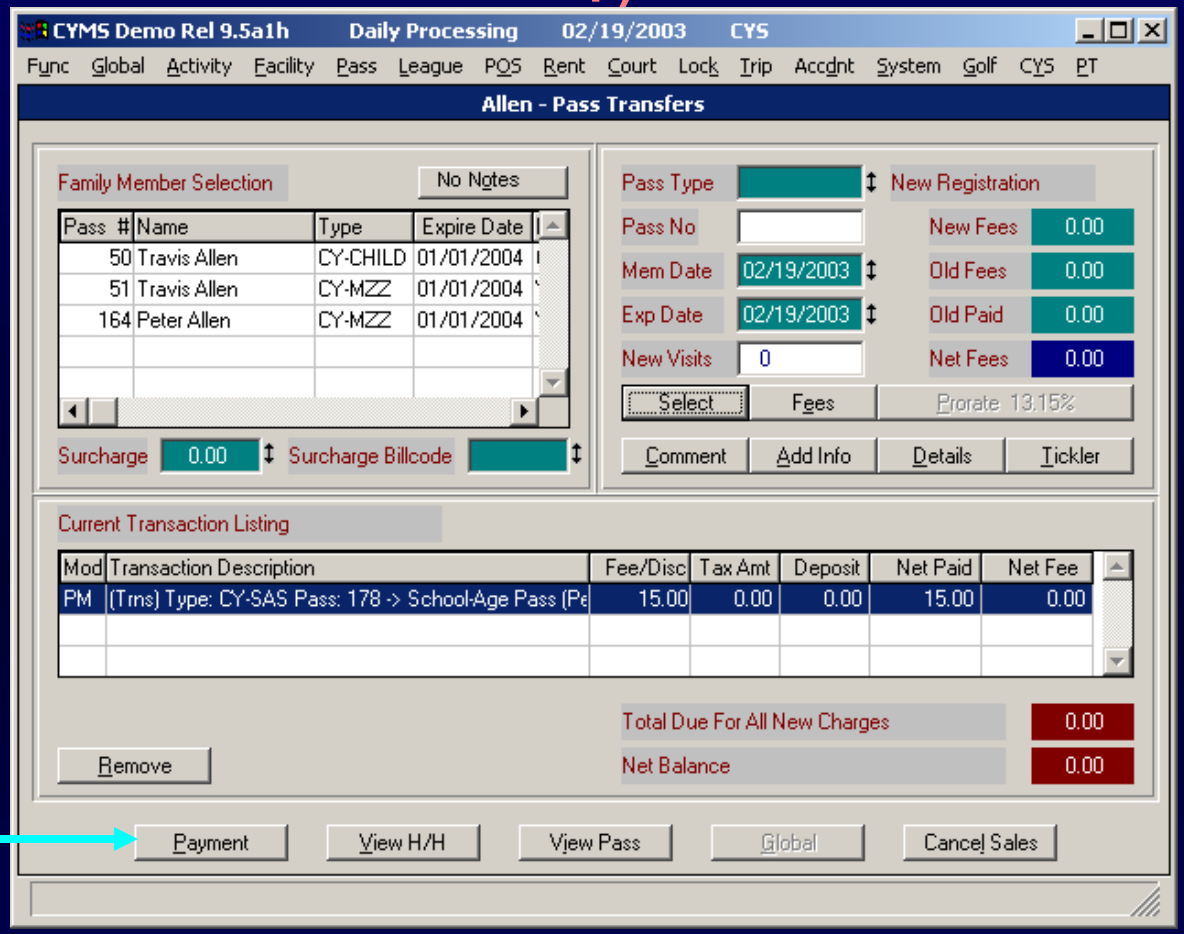
...So, the Mem Date for the new SAS pass should be changed to 1/2/2003 and the Exp Date should be changed to 1/2/2004

Important: Before clicking Select, you must change BOTH the:

Member Date and Expiration Date

(these fields always default to the current date and 1 year later respectively)

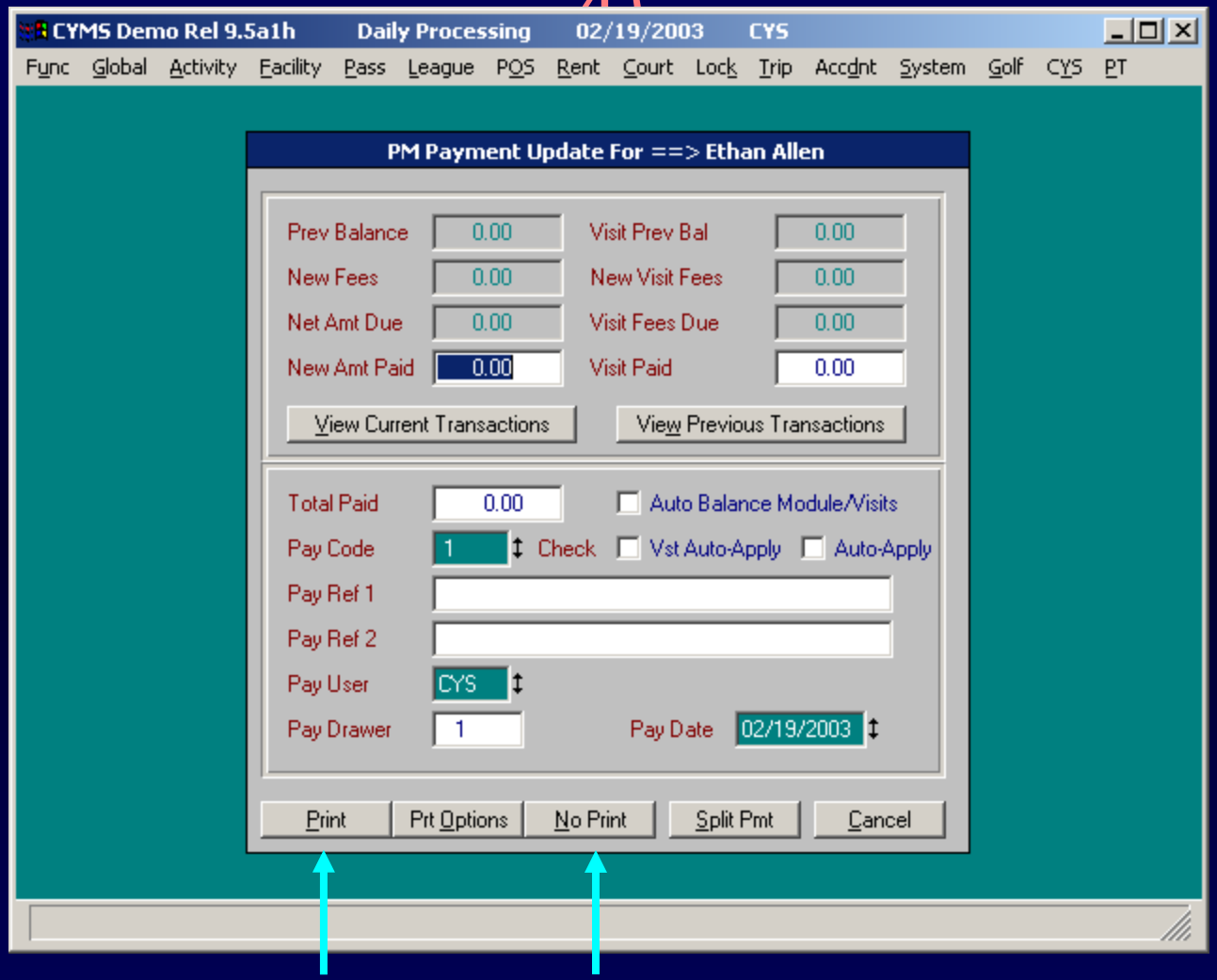
Example 3: Crossing Cost Centers (Step 4)



Now Click Select...

...and Payment to finish the transaction

Example 3: Crossing Cost Centers (Step 4)



. . . And Print or No Print

Example 4: Detail

Note: By 'like' we mean that the transition is taking place within the same CDC or SAS and within the same Cost Center (Fullday to Fullday or Partday to Partday, etc).

Example 4:

A child is transitioning from

one home to another home

or from

one 'like' CDC/SAS class to another

'like' CDC/SAS class.

Example 4: Quick Steps

Roster Reassignment:

- Moves the child to history on the old program
- Enrolls the child into the new program
- Cancels the billing on the old program
- Continues billing on the new program.
- No money goes to history so the household will not end up with a Previous Balance

Roster Reassignment does it all

Using Roster Re-assignment in the wrong circumstances will cause major financial problems.

Caution

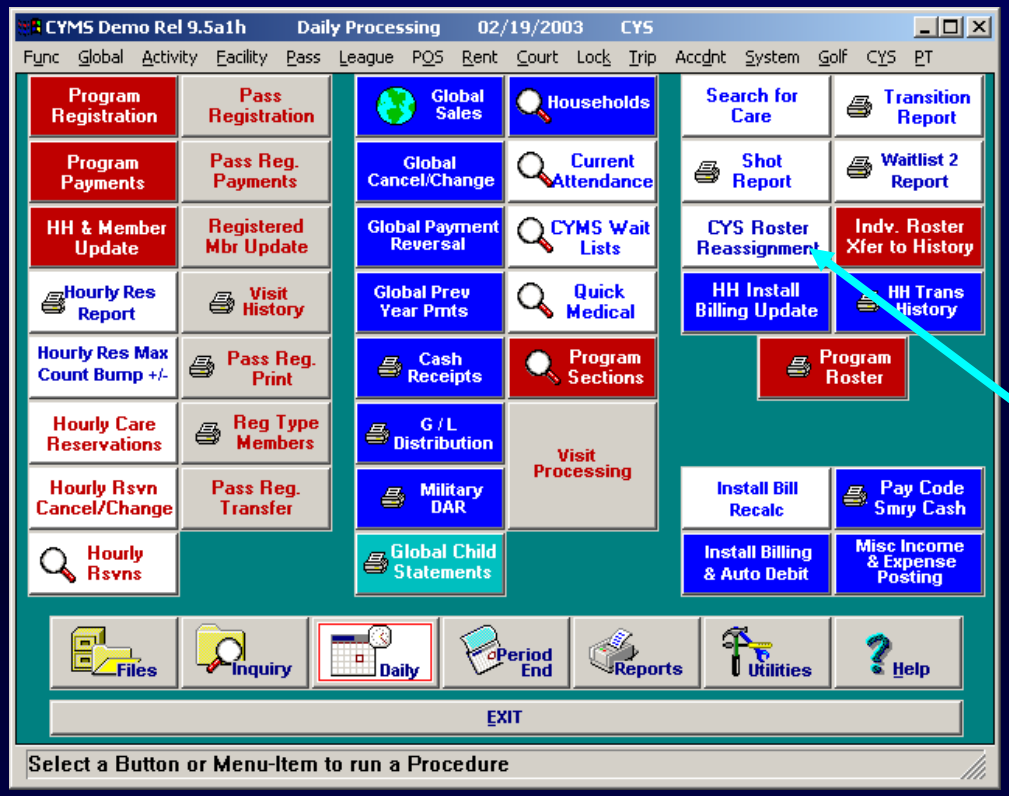
If you are unsure whether to use it, DON'T !!!!!

Call us or talk to a co-worker first!
When in doubt, it is better to use the Roster Transfer to History (Indiv.) process and do a fresh
However >>>

Example 4: Same Cost Center (Step 1)

Click the CYS Roster Reassignment button.

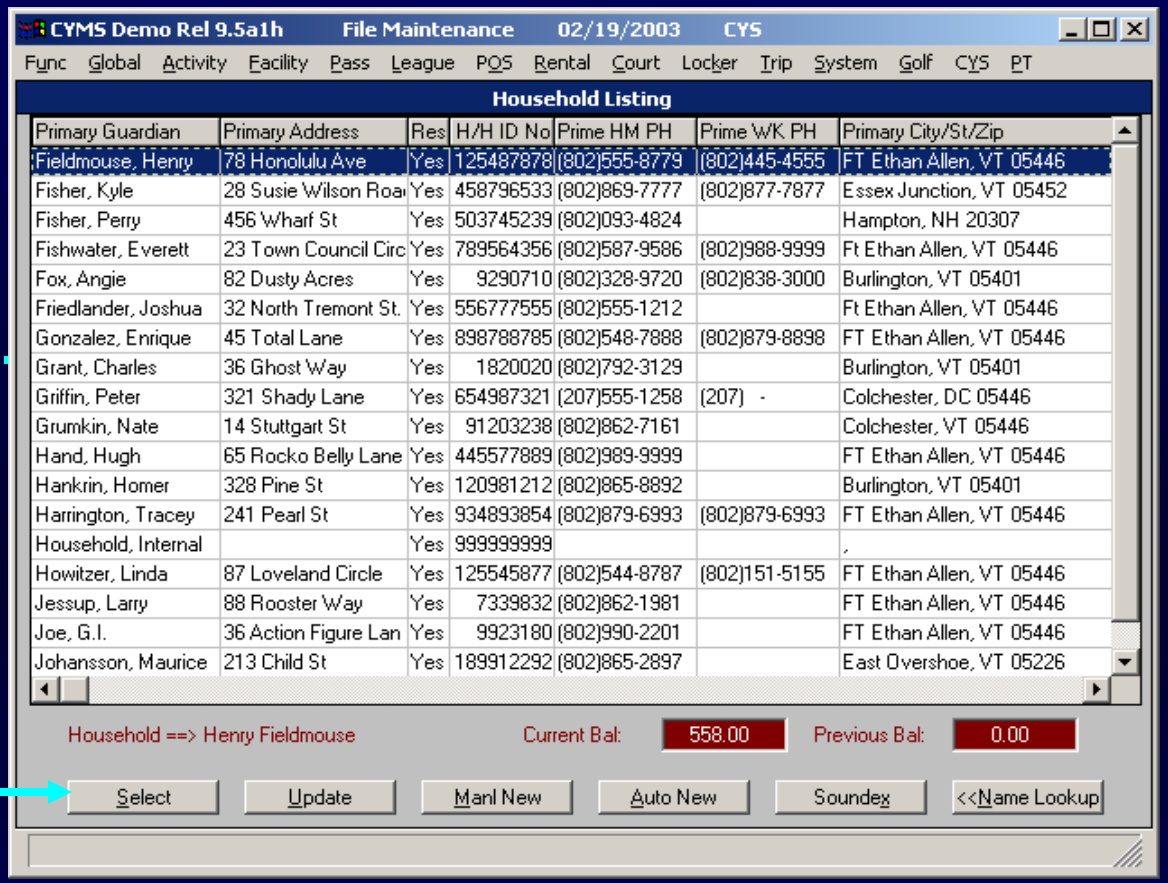
(If no button, go to: Period End -- CYS -- Roster Reassignment)



Note: This example assumes we are moving within the same center, within the same Cost Center.

We will move a child from the Infant Room to the Pre-Tod Room.

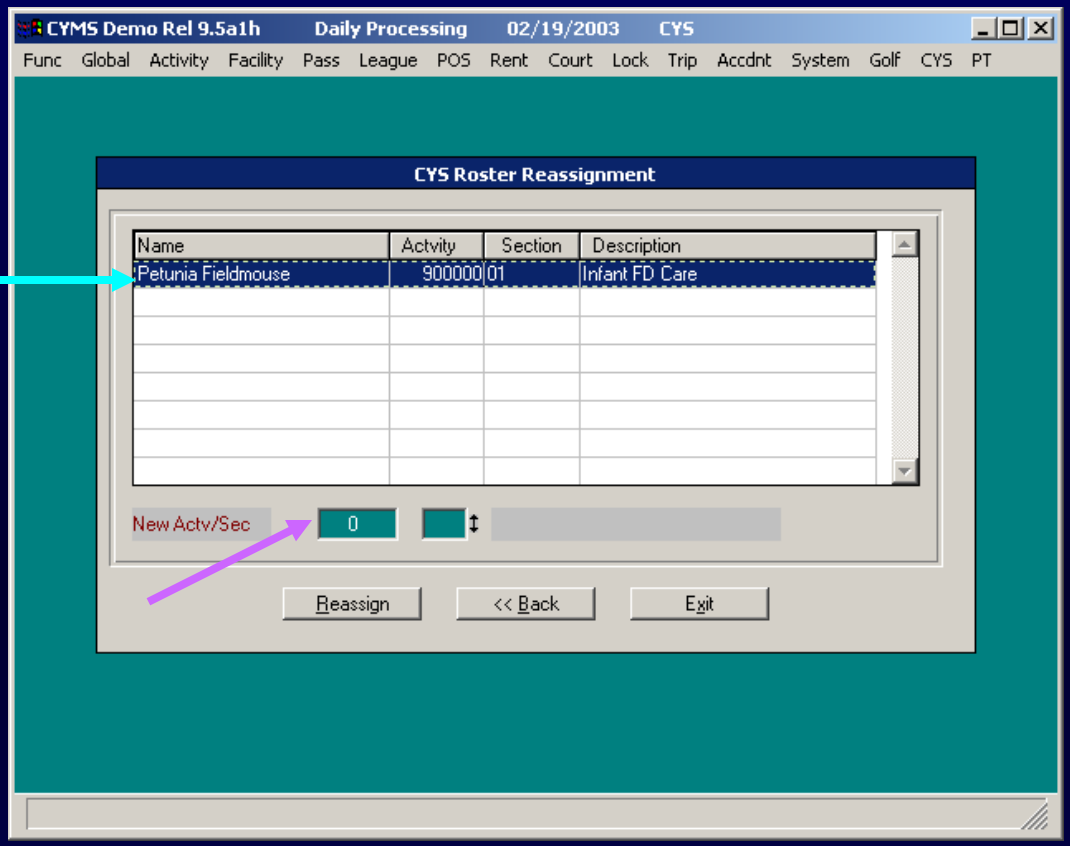
Example 4: Same Cost Center (Step 1)


CYMS Demo Rel 9.5a1h File Maintenance 02/19/2003 CYS
Func Global Activity Facility Pass League POS Rental Court Locker Trip System Golf CYS PT
Household Listing
Primary Guardian | Primary Address | Res | H/H ID No | Prime HM PH | Prime WK PH | Primary City/St/Zip
Fieldmouse, Henry | 78 Honolulu Ave | Yes | 125487878 | (802)555-8779 | (802)445-4555 | FT Ethan Allen, VT 05446
Fisher, Kyle | 28 Susie Wilson Roa | Yes | 458796533 | (802)869-7777 | (802)877-7877 | Essex Junction, VT 05452
Fisher, Perry | 456 Wharf St | Yes | 503745239 | (802)093-4824 | | Hampton, NH 20307
Fishwater, Everett | 23 Town Council Circ | Yes | 789564356 | (802)587-9586 | (802)988-9999 | Ft Ethan Allen, VT 05446
Fox, Angie | 82 Dusty Acres | Yes | 9290710 | (802)328-9720 | (802)838-3000 | Burlington, VT 05401
Friedlander, Joshua | 32 North Tremont St. | Yes | 556777555 | (802)555-1212 | | Ft Ethan Allen, VT 05446
Gonzalez, Enrique | 45 Total Lane | Yes | 898788785 | (802)548-7888 | (802)879-8898 | FT Ethan Allen, VT 05446
Grant, Charles | 36 Ghost Way | Yes | 1820020 | (802)792-3129 | | Burlington, VT 05401
Griffin, Peter | 321 Shady Lane | Yes | 654987321 | (207)555-1258 | (207) - | Colchester, DC 05446
Grumkin, Nate | 14 Stuttgart St | Yes | 91203238 | (802)862-7161 | | Colchester, VT 05446
Hand, Hugh | 65 Rocko Belly Lane | Yes | 445577889 | (802)989-9999 | | FT Ethan Allen, VT 05446
Hankrin, Homer | 328 Pine St | Yes | 120981212 | (802)865-8892 | | Burlington, VT 05401
Harrington, Tracey | 241 Pearl St | Yes | 934893854 | (802)879-6993 | (802)879-6993 | FT Ethan Allen, VT 05446
Household, Internal | | Yes | 999999999 | | | ,
Howitzer, Linda | 87 Loveland Circle | Yes | 125545877 | (802)544-8787 | (802)151-5155 | FT Ethan Allen, VT 05446
Jessup, Larry | 88 Rooster Way | Yes | 7339832 | (802)862-1981 | | FT Ethan Allen, VT 05446
Joe, G.I. | 36 Action Figure Lan | Yes | 9923180 | (802)990-2201 | | FT Ethan Allen, VT 05446
Johansson, Maurice | 213 Child St | Yes | 189912292 | (802)865-2897 | | East Overshoe, VT 05226
Household ==> Henry Fieldmouse
Current Bal: 558.00
Previous Bal: 0.00
Select
Update
Manl New
Auto New
Soundex
<<Name Lookup

Lookup the household...

...and select it!

Example 4: Same Cost Center (Step 1)

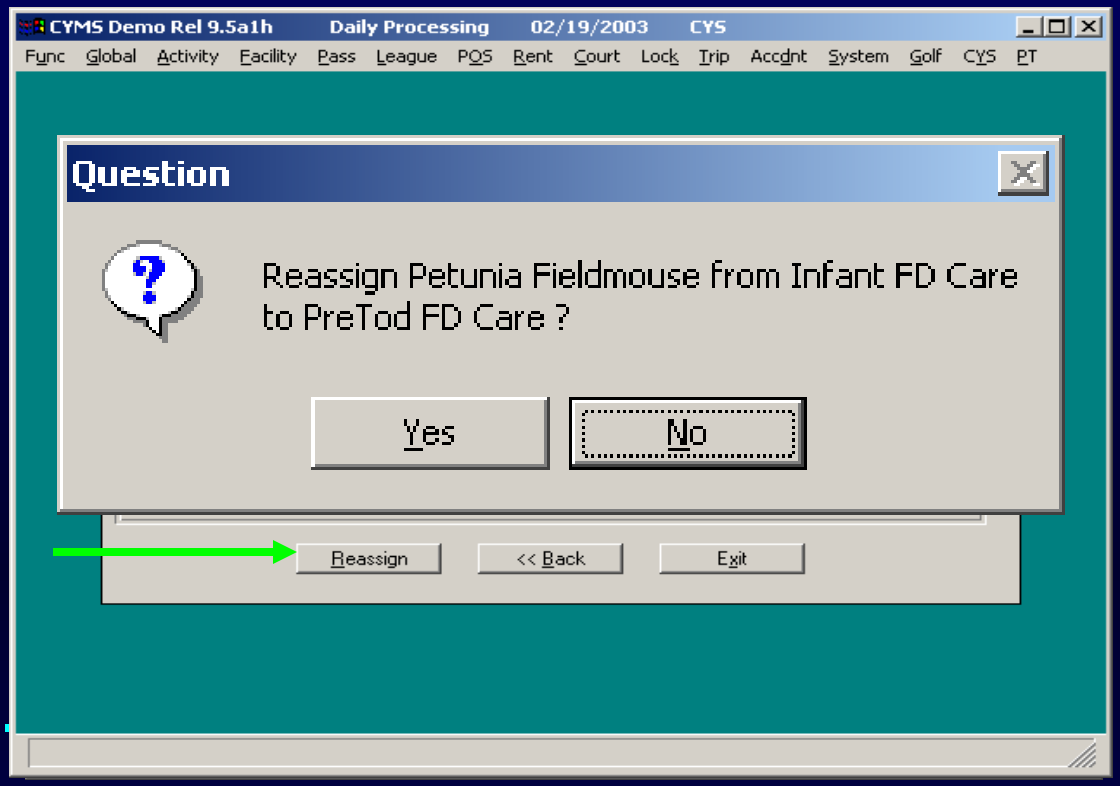


. . .And right click to find the class they are moving to

Highlight the child and the class that the child is moving from . . .

Example 4: Same Cost Center (Step 1)

Then click Reassign



Make sure all is correct

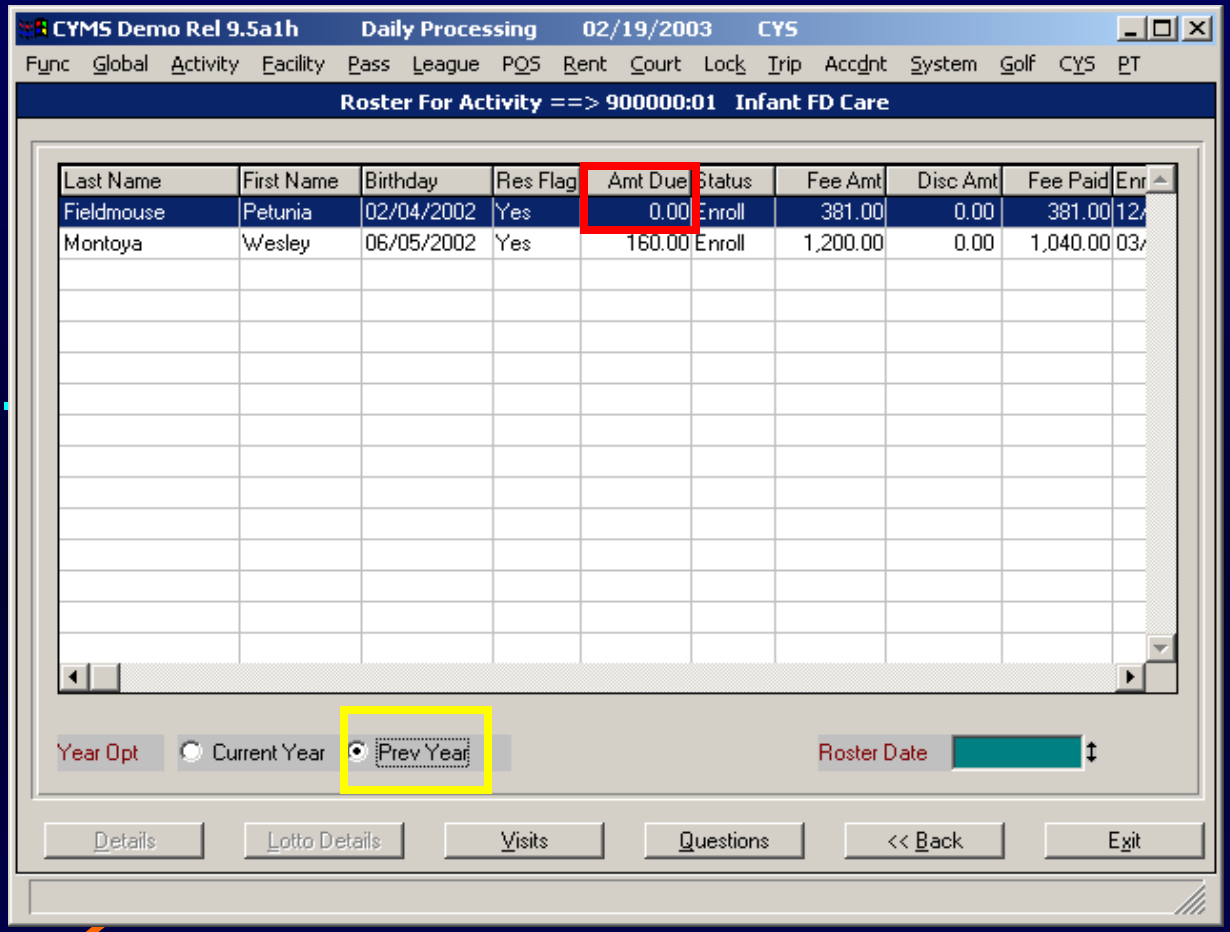
. . .

and then click Yes to continue

Highlight the new class and select it!

Example 4: Same Cost Center (Step 1)

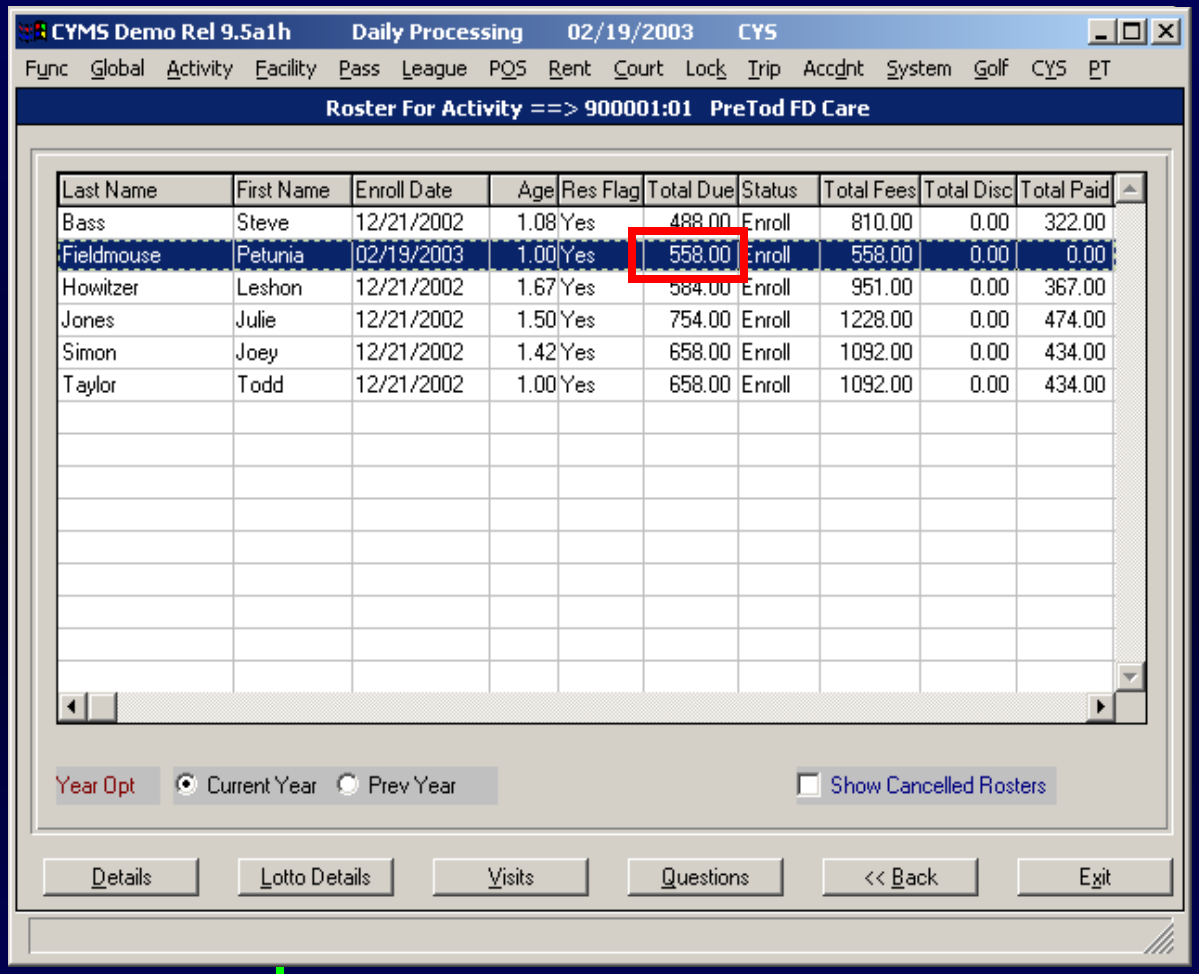
Find the From class and click Roster


CYMS Demo Rel 9.5a1h
Daily Processing
02/19/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Roster For Activity ==> 900000:01 Infant FD Care
Last Name | First Name | Birthday | Res Flag | Amt Due | Status | Fee Amt | Disc Amt | Fee Paid
Fieldmouse | Petunia | 02/04/2002 | Yes | 0.00 | Enroll | 381.00 | 0.00 | 381.00
Montoya | Wesley | 06/05/2002 | Yes | 160.00 | Enroll | 1,200.00 | 0.00 | 1,040.00
Year Opt
Current Year
Prev Year
Roster Date
Details
Lotto Details
Visits
Questions
<< Back
Exit

To view your handy work, click Program Sections

Petunia is not on the Current Year Roster But she is on the Previous Year Roster and has No Amount Due

Example 4: Same Cost Center (Step 1)


CYMS Demo Rel 9.5a1h
Daily Processing
02/19/2003
CYS
Func Global Activity Facility Pass League POS Rent Court Lock Trip Accdnt System Golf CYS PT
Roster For Activity ==> 900001:01 PreTod FD Care
Last Name | First Name | Enroll Date | Age | Res Flag | Total Due | Status | Total Fees | Total Disc | Total Paid
Bass | Steve | 12/21/2002 | 1.08 | Yes | 488.00 | Enroll | 810.00 | 0.00 | 322.00
Fieldmouse | Petunia | 02/19/2003 | 1.00 | Yes | 558.00 | Enroll | 558.00 | 0.00 | 0.00
Howitzer | Leshon | 12/21/2002 | 1.67 | Yes | 584.00 | Enroll | 951.00 | 0.00 | 367.00
Jones | Julie | 12/21/2002 | 1.50 | Yes | 754.00 | Enroll | 1228.00 | 0.00 | 474.00
Simon | Joey | 12/21/2002 | 1.42 | Yes | 658.00 | Enroll | 1092.00 | 0.00 | 434.00
Taylor | Todd | 12/21/2002 | 1.00 | Yes | 658.00 | Enroll | 1092.00 | 0.00 | 434.00
Year Opt
Current Year
Prev Year
Show Cancelled Rosters
Details
Lotto Details
Visits
Questions
<< Back
Exit

Click Back...

...Find the To Class and click Roster

Find Petunia and notice the amount due carried over from the Infant class (same cost center).

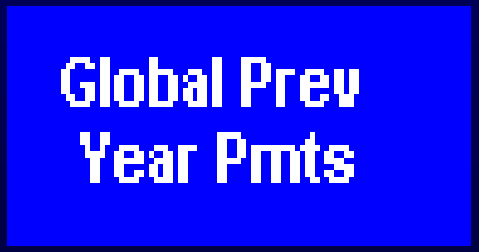
Transitioning - Key Points

1. This process moves a child from the current roster to the previous roster.

2. If the child owes money on the class they are transferring from, the balance follows them to history and becomes a previous balance.

3. ***Before*** transferring someone to history you must decide whether you need to Update Charges on the enrollment so the household doesn't end up with an invalid balance (by getting charged for service they didn't receive).

Transitioning Key Points



1. The only way to pay a Previous Balance is by using the Global Previous Year Payment button.

2. If the Previous Balance is partially or entirely an invalid balance, the only way to get rid of it is to pay it.

   - For the invalid portion you will want to use Pay Code 7 which is a Journal Payment.
     - CAUTION: Using Journal Payments in the wrong circumstances can cause major financial problems !!!!

Transitioning Key Points

CYS Roster Reassignment

Roster Reassignment:

- Transfers the child to history on the old program
- Moves the child to the new program
- Cancels billing on the old program
- Continues billing on the new program
- And even if the child owes money on the old program no money goes to history so the household won't end up with a Previous Balance.

However, if roster reassignment is used in the wrong circumstances, it will cause major financial problems.